



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Demobilization Unit Leader (DMOB)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES

1. **Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. **The Trainee** is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. **The Evaluator** is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Stafford Act • Planning CD • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		

6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Resources currently assigned • Resources en-route and/or ordered • Incident facilities, types and location 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • strategies 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		

12. Use common terminology.	I		
13. Maintain appropriate span of control.	I		
14. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
15. Provide for the safety, security, welfare and accountability of subordinates.	D-3		
16. Recognize and communicate potentially hazardous situations.	D-3		
17. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
18. Verify special precautions are taken when hazards exist.	D-3		
19. Use personal protective equipment (PPE) when issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster of subordinates.	D-3		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine if organizational structure is appropriate based on supervisor direction.	D-3		
24. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Proper ICS positions 	D-3		

25. Ensure that subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> FEMA Qualification System (FQS) Non-FEMA Agency qualified 	D-3		
26. Discuss findings and recommendations with the immediate supervisor. <ul style="list-style-type: none"> Organizational structure Shortages or surpluses Issues and concerns Facility needs if applicable 	D-3		
27. Make any organizational adjustments if necessary.	D-3		
28. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-3		
29. Request additional personnel, supplies, services, and equipment needed.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> Use common terminology Avoid slang or other confusing terminology Respectful word choices Be clear and concise Minimize use of acronyms 	I		
31. Consistently demonstrate professional and appropriate non-verbal communication. <ul style="list-style-type: none"> Practice active listening Eye contact Appropriate body language 	I		
32. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> Participating agencies Emergency Support Functions (ESF) Counterparts at all levels 	I		

33. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
34. Share current information with coworkers and immediate supervisor.	D-3		
35. Be an effective team player. <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
36. Attend scheduled Briefings as required	D-3		
37. Brief subordinates with relevant information on their assignments and check for understanding. <ul style="list-style-type: none"> • Discuss special safety considerations or hazards situations • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	D-3		
38. Debrief your immediate staff at the end of the operational period to gather information. <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
39. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
41. Hold personnel accountable for execution of assigned tasks.	D-3		
42. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-3		
43. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
44. Request additional resources or release surplus resources.	D-3		
45. Address logistical problems reported by subordinates.	D-3		
46. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
47. Gather and analyze information to validate subordinate report of accomplishments.	D-3		
48. Ensure work completed is consistent with direction and policy. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
49. Keep assigned personnel informed of changes.	D-3		
50. Notify immediate supervisor of Unit personnel status changes when they occur.	D-3		
51. Make recommendations for next operational period to immediate supervisor.	D-3		

Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
53. Explain how Unit's assignments fit into the context of the bigger picture.	D-3		
54. Establish work assignments and set priorities.	D-3		
55. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
56. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
57. Provide continuous feedback on performance. <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-3		
58. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for ongoing training and professional development for assigned personnel to develop required skills • Coach personnel in developing and maintaining skills 	D-3		
59. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
60. Prepare and discuss formal performance evaluations with subordinates.	D-3		

61. Create a work environment that provides mutual respect and equal opportunity for all Unit personnel.	D-3		
62. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
63. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
65. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences.	I		
66. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Develop an Incident Demobilization Plan			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Estimate size and extent of demobilization. <ul style="list-style-type: none"> Review incident resource records Identify surplus resources and probable release times Communicate with incident facilities as necessary Consider the need for a Demobilization facility 	I		
68. Detail specific responsibilities, release priorities, and procedures approved by the FCO.	I		
69. Establish check-out procedures in coordination with Finance/Administration and Logistics.	I		
70. Prepare appropriate maps and instructions to be included in the demobilization plan as needed.	I		
71. Prepare and update demobilization timeline to ensure currency.	I		
72. Publish and distribute the Incident Demobilization Plan.	I		

Behavior/Activity: Coordinate demobilization with Agency Representatives			
Competency: Communication-Verbal (C4); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
73. Coordinate with all Agency Representatives (AREP) to ensure all agency equipment and personnel are accounted for and properly released before departure. <ul style="list-style-type: none"> • ESFs • OFAs • NGOs 	I		
74. Establish necessary communications with off-incident facilities such as RRCC.	I		
75. Confirm that agency has a signed Deactivation Letter (Stand Down letter for DOD) by the Operations Section Chief.	I		

Behavior/Activity: Supervise the implementation of the Incident Demobilization Plan			
Competency: Planning & Organizing (C20); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
76. Inform all Sections/Units of their specific demobilization responsibilities.	I		
77. Monitor progress of the established demobilization timeline and make adjustments as necessary.	I		
78. Coordinate with demobilization support elements. <ul style="list-style-type: none"> • Finance/Administration • Logistics 	I		

Behavior/Activity: Coordinate with State or Federal counterpart in a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
79. Coordinate with State’s Incident Management Team (IMT) Demobilization Unit Leader and other appropriate State planning section members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
80. Be “participatory” - encourage the State’s participation in unit activities. <ul style="list-style-type: none"> • Accommodate the State’s participation in the unit by fairly sharing work space when collocated or unified • Ensure subordinates work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
81. Negotiate time of transition.	I		
82. Provide for adequate overlap to ensure efficient transfer of duties.	I		
83. Brief replacement on current situation.	I		
84. Ensure appropriate information is up-to-date. <ul style="list-style-type: none"> • Accurate • Special issues/concerns 	I		
85. Ensure an effective transition of duties is accomplished.	I		
86. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
87. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
88. Submit appropriate current, accurate and complete records to immediate supervisor.	D-3		
89. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
90. Obtain performance appraisal from supervisor.	I		
91. Report to the Training Unit at completion of training assignment.	I		
92. Make return travel arrangements.	I		
93. Prepare final travel voucher.	I		
94. Return accountable property to the Accountable Property Office (APO).	I		
95. Submit final timesheet, appraisal form, and travel voucher.	I		
96. Check out with the Automated Deployment Database (ADD).	I		
97. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Demobilization Unit Leader (DMOB)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Demobilization Unit Leader (DMOB)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Demobilization Unit Leader (DMOB)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Document Unit Leader (DOCL)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

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DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest ↓	D - 1 D - 2 D - 3	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
↓ Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Stafford Act • Planning CD • HSIN/COP User Guide • FEMA Manual 5400.2 (Records management—Files Maintenance and Disposition) 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check-in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Resources currently assigned • Resources en-route and/or ordered • Incident facilities, types and location 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies • Work expectations • Assigned workspace • Security considerations • Safety considerations 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		
13. Maintain appropriate span of control.	I		
14. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
15. Provide for the safety, security, welfare and accountability of subordinates.	D-3		
16. Recognize and communicate potentially hazardous situations.	D-3		
17. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
18. Verify special precautions are taken when hazards exist.	D-3		
19. Use personal protective equipment (PPE) when issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster of subordinates.	D-3		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine if organizational structure is appropriate based on supervisor direction.	D-3		
24. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Proper ICS positions 	D-3		
25. Ensure that subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-3		
26. Discuss findings and recommendations with the immediate supervisor. <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses • Issues and concerns • Facility needs if applicable 	D-3		
27. Make any organizational adjustments if necessary.	D-3		
28. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-3		
29. Request additional personnel, supplies, services, and equipment needed.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>31. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>32. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>33. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>34. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>35. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings</p>			
<p>Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>36. Attend scheduled Briefings as required.</p>	D-3		
<p>37. Brief subordinates with relevant information on their assignments and check for understanding.</p> <ul style="list-style-type: none"> • Discuss special safety considerations or hazards situations • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	D-3		

38. Debrief your immediate staff at the end of the operational period to gather information. <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
39. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
41. Hold personnel accountable for execution of assigned tasks.	D-3		
42. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-3		
43. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
44. Request additional resources or release surplus resources.	D-3		
45. Address logistical problems reported by subordinates.	D-3		
46. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
47. Gather and analyze information to validate subordinate report of accomplishments.	D-3		
48. Ensure work completed is consistent with direction and policy. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
49. Keep assigned personnel informed of changes.	D-3		
50. Notify immediate supervisor of Unit personnel status changes when they occur.	D-3		
51. Make recommendations for next operational period to immediate supervisor.	D-3		

Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
53. Explain how Unit's assignments fit into the context of the bigger picture.	D-3		
54. Establish work assignments and set priorities.	D-3		
55. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
56. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
57. Provide continuous feedback on performance. <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-3		
58. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for ongoing training and professional development for assigned personnel to develop required skills • Coach personnel in developing and maintaining skills 	D-3		
59. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
60. Prepare and discuss formal performance evaluations with subordinates.	D-3		

61. Create a work environment that provides mutual respect and equal opportunity for all Unit personnel.	D-3		
62. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
63. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
65. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences.	I		
66. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Set up of the Documentation Unit work area			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Supervise the set up of the Documentation work area to facilitate the organization of incident files.	I		
68. Ensure that duplication services for the Planning Section are established.	I		
69. Obtain locking file cabinet for secure files storage.	I		

Behavior/Activity: Create and maintain an incident records management system in accordance with FEMA Manual 5400.2 (Records Management—Files Maintenance and Disposition)			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
70. Function as File Custodian for Planning Section records and documents.	I		
71. Ensure all sensitive records and documents are marked, secured, and stored in a locking file cabinet.	I		
72. Maintain control and access to all Planning Section files.	I		
73. Produce a back-up media for files as appropriate.	I		
74. Maintain a set of easily portable critical files (mostly in electronic format) for rapid evacuation if the COOP is activated.	I		

Behavior/Activity: Ensure that incident information products prepared by the Documentation Unit are complete and accurate			
Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
75. Ensure required recurring and ad-hoc reports and documents are developed. <ul style="list-style-type: none"> • Initial Operating Report (IOR) • Situation Report (SitRep) • Spot Reports (SpotRep) • Fact Sheet • Briefing Books 	I		
76. Ensure preparation of the Incident Status Summary (ICS 209) as required.	I		
77. Ensure development and maintenance of Incident Chronology.	I		
78. Ensure that all reports and documents produced by the Documentation Unit are proofread for accuracy and correctness.	I		
79. Interact with the Planning Section Chief to evaluate need to designate any reports or documents as FOUO.	I		

Behavior/Activity: Ensure that products prepared by the Documentation Unit are distributed appropriately			
Competency: Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
80. Interact with the Situation Unit Leader to establish reporting schedule for all required reports and obtain approval of the Planning Section Chief.	I		
81. Ensure required documents are posted to appropriate sites. <ul style="list-style-type: none"> • Common drive • HSIN • SharePoint 	I		
82. Ensure documents are distributed appropriately. <ul style="list-style-type: none"> • Email • Hard copy 	I		

Behavior/Activity: Record meeting minutes for official records			
Competency: Attention to Detail (C3); Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
83. Take minutes at FCO/SCO Command and General Staff meetings and prepare documentation for official records. <ul style="list-style-type: none"> • Hand written notes • Transcription from audio 	I		
84. Take minutes at the Planning meeting and prepare documentation for official records.	I		
85. Take minutes at other meetings as assigned and prepare documentation for official records.	I		

Behavior/Activity: Coordinate with State counterpart in a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
86. Coordinate with State's Incident Management Team (IMT) Documentation Unit Leader and other appropriate State planning section members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
87. Be "participatory" - encourage the State's participation in unit activities. <ul style="list-style-type: none"> • Accommodate the State's participation in the unit by fairly sharing work space when collocated or unified • Ensure subordinates work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
88. Negotiate time of transition.	I		
89. Provide for adequate overlap to ensure efficient transfer of duties.	I		
90. Brief replacement on current situation.	I		
91. Ensure appropriate information is up-to-date. <ul style="list-style-type: none"> • Accurate • Special issues/concerns 	I		
92. Ensure an effective transition of duties is accomplished.	I		
93. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
94. Publish and distribute final version of chronology, Situation Report, and Demobilization Plan.	I		
95. Dispose of non-archived I files and materials at the close of a JFO and shred sensitive data.	I		
96. Prepare Planning Section official files for transfer to Region. <ul style="list-style-type: none"> • Ensure all incident records are shipped to the appropriate Region • Maintain a 'chain of custody' on all records and documents at closeout 	I		
97. Submit items for the Remedial Action Management Program (RAMP).	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
98. Obtain performance appraisal from supervisor.	I		
99. Report to the Training Unit at completion of training assignment.	I		
100. Make return travel arrangements.	I		
101. Prepare the final travel voucher.	I		
102. Return accountable property to the Accountable Property Office (APO).	I		
103. Submit final timesheet, appraisal form, and travel voucher.	I		
104. Check out with the Automated Deployment Database (ADD).	I		
105. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Document Unit Leader (DOCL)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Document Unit Leader (DOCL)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Document Unit Leader (DOCL)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Field Observer (FOBS)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
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- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest ↓	D - 1 D - 2 D - 3	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
↓ Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
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- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
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2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
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 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
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4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
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 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Stafford Act • Planning CD • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • GPS unit • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Work Expectations • Security considerations • Safety considerations 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>19. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>20. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>21. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>22. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>23. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>24. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	I		
<p>25. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	I		
<p>26. Exhibit appropriate public stewardship of taxpayer dollars.</p>	I		

Behavior/Activity: Obtain instructions on field assignment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
27. Obtain briefing from immediate supervisor. <ul style="list-style-type: none"> • Location of assignment • Types of information required • Priorities • Time limits for completion • Methods of communication • Reporting and data transmission schedule • Transportation requirements 	I		
28. Attend Operations Briefing (may be by teleconference).	I		
29. Obtain current Incident Action Plan (IAP) for operational reference.	I		

Behavior/Activity: Observe, record, and report incident status information from personal observations			
Competency: Attention to Detail (C3); Communication - Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Observe, record, report observed information as assigned.	I		
31. Observe, record, and promptly report other information that may be of value to incident operations. <ul style="list-style-type: none"> • Key infrastructure restored such as electrical power, water treatment facilities, major roads, medical facilities • Key services coming back on line such as gas stations, grocery stores, Wal-Mart, banks 	I		
32. Immediately report any condition that may cause danger or be a safety hazard to personnel.	I		
33. Submit daily summary of activities and findings to immediate supervisor.	I		

Behavior/Activity: Keep appropriate personnel informed of your location and status			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
34. Contact the Division Supervisor or other ranking FEMA official in the area.	I		
35. Keep immediate supervisor apprised of changes in location.	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
36. Find out time of transition from immediate supervisor.	I		
37. Identify appropriate information needed for transition of duties. <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
38. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
39. Obtain performance appraisal from supervisor.	I		
40. Report to the Training Unit at completion of training assignment.	I		
41. Make return travel arrangements.	I		
42. Prepare the final travel voucher.	I		
43. Return accountable property to the Accountable Property Office (APO).	I		
44. Submit final timesheet, appraisal form, and travel voucher.	I		
45. Check out with the Automated Deployment Database (ADD).	I		
46. Check out with IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Field Observer (FOBS)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
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Evaluation Record

Field Observer (FOBS)

TRAINEE NAME

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Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
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Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
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		to
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FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Field Observer (FOBS)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Information Specialist (INSP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

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 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Stafford Act • Planning CD • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location • Special safety considerations or hazardous situations 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Work expectations • Security considerations • Safety considerations 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>19. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>20. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>21. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>22. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>23. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	I		
<p>24. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	I		
<p>25. Exhibit appropriate public stewardship of taxpayer dollars.</p>	I		

Behavior/Activity: Collect information as directed			
Competency: Analysis/Reasoning (C2); Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
26. Collect incident specific information from various sources using the disaster specific information collection plan. <ul style="list-style-type: none"> • Program areas and other Sections • State and federal agencies • Regional Response Coordination Center (RRCC) • Databases • Internet 	I		
27. Evaluate and determine the validity and usefulness of the information.	I		
28. Collect information for the jurisdictional profiles.	I		

Behavior/Activity: Organize and analyze informational data as directed			
Competency: Analysis/Reasoning (C2)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
29. Organize raw information (e.g., databases, charts, graphs,) to establish a common operating picture.	I		
30. Assess the validity and reliability of information.	I		
31. Ensure that the information being analyzed corresponds to the correct reporting period.	I		
32. Use data to analyze trends.	I		
33. Identify relationships, patterns and trends to support decision making.	I		
34. Identify information requiring immediate dissemination and determine the audience for the information.	I		

Behavior/Activity: Produce clear and accurate planning products using standardized formats as directed Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
35. Participate in the development of the Information Collection Plan.	I		
36. Provide information to assist in the development of reports, such as: <ul style="list-style-type: none"> • SPOT Reports • Situation Reports • Incident Chronology • Strategic Timeline • Jurisdictional profile 	I		
37. Provide information to assist the development of briefings utilizing Microsoft Office. <ul style="list-style-type: none"> • Charts and graphs • Data tables • Organization charts • Visual aids 	I		

Behavior/Activity: Assist in the setup and maintenance of the situation room Competency: Attention to Detail (C3); Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
38. Set up and maintain the Situation Room. <ul style="list-style-type: none"> • Seating arrangements • Tent cards • Provide agendas and handouts as required 	I		
39. Manage the schedule for use of the Situation Room.	I		
40. Maintain current informational displays. <ul style="list-style-type: none"> • Incident Objectives • Incident maps • Organization Charts • Planning “P” • Strategic Timeline • Meeting rules 	I		
41. Ensure that audiovisual equipment is adequate and in working order.	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
42. Find out time of transition from immediate supervisor.	I		
43. Identify appropriate information needed for transition of duties. <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
44. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
45. Obtain performance appraisal from supervisor.	I		
46. Report to the Training Unit at completion of training assignment.	I		
47. Make return travel arrangements.	I		
48. Prepare the final travel voucher.	I		
49. Return accountable property to the Accountable Property Office (APO).	I		
50. Submit final timesheet, appraisal form, and travel voucher.	I		
51. Check out with the Automated Deployment Database (ADD).	I		
52. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Information Specialist (INSP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Information Specialist (INSP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Information Specialist (INSP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Planning Support Unit Leader (PLSL)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Planning Field Operations Manual 9330.1 • Planning CD • Stafford Act • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Resources currently assigned • Resources en-route and/or ordered • Incident facilities, types and location 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • strategies 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		
13. Maintain appropriate span of control.	I		
14. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
15. Provide for the safety, security, welfare and accountability of subordinates.	D-3		
16. Recognize and communicate potentially hazardous situations.	D-3		
17. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
18. Verify special precautions are taken when hazards exist.	D-3		
19. Use personal protective equipment (PPE) when issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster of subordinates.	D-3		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine if organizational structure is appropriate based on supervisor direction.	D-3		
24. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Proper ICS positions 	D-3		
25. Ensure that subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-3		
26. Discuss findings and recommendations with the immediate supervisor. <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses • Issues and concerns • Facility needs if applicable 	D-3		
27. Make any organizational adjustments if necessary.	D-3		
28. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-3		
29. Request additional personnel, supplies, services, and equipment needed.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>31. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>32. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>33. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>34. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>35. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings</p>			
<p>Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>36. Attend scheduled Briefings as required.</p>	D-3		
<p>37. Brief subordinates with relevant information on their assignments and check for understanding.</p> <ul style="list-style-type: none"> • Discuss special safety considerations or hazards situations • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	D-3		

<p>38. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
<p>39. Brief immediate supervisor on results of debriefings.</p>	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>40. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.</p>	D-3		
<p>41. Hold personnel accountable for execution of assigned tasks.</p>	D-3		
<p>42. Delegate specific authority based on the assigned tasks to assigned Specialists.</p>	D-3		
<p>43. Make adjustments in response to new information, changing conditions, or unexpected obstacles.</p>	D-3		
<p>44. Request additional resources or release surplus resources.</p>	D-3		
<p>45. Address logistical problems reported by subordinates.</p>	D-3		
<p>46. Make appropriate decisions and/or adjustments based on analyzed and validated information.</p>	D-3		
<p>47. Gather and analyze information to validate subordinate report of accomplishments.</p>	D-3		
<p>48. Ensure work completed is consistent with direction and policy.</p> <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
<p>49. Keep assigned personnel informed of changes.</p>	D-3		
<p>50. Notify immediate supervisor of Unit personnel status changes when they occur.</p>	D-3		
<p>51. Make recommendations for next operational period to immediate supervisor.</p>	D-3		

Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
53. Explain how Unit's assignments fit into the context of the bigger picture.	D-3		
54. Establish work assignments and set priorities.	D-3		
55. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
56. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
57. Provide continuous feedback on performance. <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-3		
58. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for training of assigned personnel to develop required skills • Coach personnel in developing and maintaining skills 	D-3		
59. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
60. Prepare and discuss formal performance evaluations with subordinates.	D-3		

61. Create a work environment that provides mutual respect and equal opportunity for all Unit personnel.	D-3		
62. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
63. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
65. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences.	I		
66. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Obtain relevant information to develop plans			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Compile and update information to support plan development. <ul style="list-style-type: none"> • Continuity of Operations Plan (COOP) • Strategic Plan and Timeline • Transition Plan • Closeout Plan • Demobilization Plan when assigned to the Demobilization Unit • Other Plans 	I		
68. Obtain timeframes for briefings; the incident action planning cycle; planning and team meetings.	I		
69. Coordinate with the Situation Unit to obtain current situational information.	I		

Behavior/Activity: Assemble and Publish the Incident Action Plan			
Competency: Incident Action Planning (C11); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
70. Participate in the incident action planning process.	I		
71. Oversee collection of the IAP components. <ul style="list-style-type: none"> • Incident Objectives (ICS 202) • Organizational Assignment List (ICS 203) • Assignment List (ICS 204) • Incident Radio Communications Plan (ICS 205) • Communications List (ICS 205A) • Medical Plan (ICS 206) • Incident Organization Chart (ICS 207) • Safety message • Incident map(s) • Any other attachments necessary 	I		
72. Assemble components into a completed IAP for approval.	I		
73. Publish the approved IAP.	I		
74. Provide planning support to other operational elements in IAP preparation as requested.	I		

Behavior/Activity: Develop and maintain an Advance Operational Plan (AOP) in coordination with the Operations Section Chief (OSC)			
Competency: Analysis/Reasoning (C2); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
75. Work with the OSC, operations personnel (federal and state) to determine the need to develop and AOP.	D-3		
76. Work with Operations personnel (federal and state) to develop and maintain an AOP (when needed) identifying critical resource needs estimates for multiple operational periods (normally 2-7).	D-3		
77. Assist operational elements with or provides analysis of requirements and trends identified in the AOP.	D-3		

Behavior/Activity: Assist other functional elements in the development of Incident Functional Plans when requested or directed			
Competency: Manage Development of Plans (C17); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
78. Provide assistance in developing and reviewing Incident Functional Plans. <ul style="list-style-type: none"> • Power restoration • Interim housing • Debris management • Facilities plans 	I		

Behavior/Activity: Manage development of the Incident Strategic Plan and IFPs that are assigned to the Planning Support Unit			
Competency: Manage Development of Plans (C17)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
79. Prepare an Incident Strategic Plan and Timeline for Unified Coordination Group (UCG).	D-3		
80. Prepare a COOP for approval by the UCG.	D-3		
81. Prepare/compile the Transition Plan as needed.	D-3		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the Incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
82. Maintain a log documenting significant unit decisions relating to the incident.	I		
83. Maintain a unit personnel log. <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		

Behavior/Activity: Coordinate with State counterpart in a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
84. Coordinate with State's Incident Management Team (IMT) Planning Support Leader and other appropriate State planning section members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
85. Be "participatory" encourage the State's participation in unit activities. <ul style="list-style-type: none"> • Accommodate the State's participation in the unit by fairly sharing work space when collocated or unified • Ensure subordinates work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
86. Negotiate time of transition.	I		
87. Provide for adequate overlap to ensure efficient transfer of duties.	I		
88. Brief replacement on current situation.	I		
89. Ensure appropriate information is up-to-date. <ul style="list-style-type: none"> • Accurate • Special issues/concerns 	I		
90. Ensure an effective transition of duties is accomplished.	I		
91. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
92. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
93. Submit appropriate current, accurate and complete records to immediate supervisor.	D-3		
94. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
95. Obtain performance appraisal from supervisor.	I		
96. Report to the Training Unit at completion of training assignment.	I		
97. Make return travel arrangements.	I		
98. Prepare the final travel voucher.	I		
99. Return accountable property to the Accountable Property Office (APO).	I		
100. Submit final timesheet, appraisal form, and travel voucher.	I		
101. Check out with the Automated Deployment Database (ADD).	I		
102. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Planning Support Unit Leader (PLSL)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Planning Support Unit Leader (PLSL)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Planning Support Unit Leader (PLSL)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Planning Specialist (PLSP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES

1. Certifying Official is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Planning Field Operations Guide • Stafford Act • Planning CD • HSIN/COP User Guide • Property issued for use on the incident including appropriate hand receipts for accountable property 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location • Special safety considerations or hazardous situations 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of knowledge of ICS. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>19. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	<p>I</p>		
<p>20. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	<p>I</p>		
<p>21. Share current information with coworkers and immediate supervisor.</p>	<p>D-3</p>		
<p>22. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	<p>D-3</p>		

<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>23. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	<p>I</p>		
<p>24. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	<p>I</p>		
<p>25. Exhibit appropriate public stewardship of taxpayer dollars.</p>	<p>I</p>		

Behavior/Activity: Assist the Planning Support Unit Leader in developing the Incident Action Plan (IAP)			
Competency: Incident Action Planning (C11); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
26. Attend and take notes at FCO/SCO (Command and General Staff meeting) Meeting and Planning Meeting as directed.	I		
27. Attend the Operations Tactics Meeting and take notes as directed.	I		
28. Gather IAP inputs. <ul style="list-style-type: none"> • Medical Plan (ICS 206) • Incident Briefing (ICS 201) • Incident Status Summary (ICS 209) • Incident Objectives (ICS 202) • Organization Assignment List (ICS 203) • Assignment List (ICS 204) • Incident Radio Communications Plan (ICS 205) • Incident Organization Chart (ICS 207) • Operational Planning Worksheet (ICS 215) 	I		
29. Assemble IAP inputs in appropriate IAP sequence and format.	I		
30. Convert document to PDF format.	I		
31. Ensure IAP is reviewed by Planning Support Unit Leader prior to the Planning Meeting.	I		
32. Make adjustments to IAP per direction of the Unified Coordination Group (UCG) at the Planning Meeting.	I		
33. Publish the IAP In coordination with the Documentation Unit Leader, once approved by the UCG.	I		
34. Distribute the IAP as directed.	I		

Behavior/Activity: Assist the Planning Support Unit Leader in producing and maintaining the Strategic Plan			
Competency: Manage Development of Plans (C17); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
35. Prepare the draft Strategic Plan as directed by the Planning Support Unit Leader.	D-3		
36. Prepare, display, and maintain Strategic Timeline as milestones and goals are established.	D-3		
37. Gather Strategic Staffing Projection input from incident organization elements and staffing pattern data from ADD.	D-3		

38. Assemble and publish the Strategic Plan.	D-3		
39. Update Strategic Plan as needed.	D-3		

Behavior/Activity: Assist other incident organization elements to develop contingency, transition and other plans as directed by the Planning Support Unit Leader			
Competency: Manage Development of Plans (C17); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. As directed by the Planning Support Unit Leader, assist other incident organization elements develop plans. <ul style="list-style-type: none"> • Provide examples, formats, and planning aids as required • Attend and/or facilitate section, unit, or team planning meetings • Assist in the development and writing of plans as required 	I		
41. Assist PLSL publish and distribute plans in a timely manner. <ul style="list-style-type: none"> • Coordinate publication with Documentation Unit Leader 	I		

Behavior/Activity: Support the Planning Support Unit Leader in the position as the Remedial Action Coordinator for the Remedial Action Management Program (RAMP)			
Competency: Attention to Detail (C3); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
42. Coordinate all Hot wash activities with the Facilitator.	I		
43. Survey Sections and determine need, if any, for functional hot washes.	I		
44. Request facilitator by name through ADD.	I		
45. Provide appropriate incident information for facilitator to complete logistical arrangements.	I		
46. Finalize hot wash agenda, schedule meeting room, appoint recorders, and extend invitations.	I		
47. Identify team members and OFA personnel who may have departed the venue and make notifications.	I		
48. Distribute RAMP forms and collect completed input forms.	I		
49. Categorize all issues, lessons learned and smart practices.	I		
50. Assist Facilitator in preparing final RAMP report.	I		

Behavior/Activity: As directed by the Planning Support Unit Leader work with State's Incident Management Team Planning Section members			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
51. Establish and maintain open and effective communications.	I		
52. Identify and promptly report disagreements, issues, and misunderstandings to the Planning Support Unit Leader.	I		
53. Share critical information and contingency plans as directed by the Planning Support Unit Leader.	I		
54. Be pro-active in anticipation coordination issues early and take action as directed by the Planning Support Unit Leader to mitigate or resolve.	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
55. Find out time of transition from immediate supervisor.	I		
56. Identify appropriate information needed for transition of duties. <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
57. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
58. Obtain performance appraisal from supervisor.	I		
59. Report to the Training Unit at completion of training assignment.	I		
60. Make return travel arrangements.	I		
61. Prepare the final travel voucher.	I		
62. Return accountable property to the Accountable Property Office (APO).	I		
63. Submit final timesheet, appraisal form, and travel voucher.	I		
64. Check out with the Automated Deployment Database (ADD).	I		
65. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Planning Specialist (PLSP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Planning Specialist (PLSP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Planning Specialist (PLSP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Planning Section Chief Type I (PSC1)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES

1. **Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. **The Trainee** is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. **The Evaluator** is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
2. Obtain relevant situational information on your assignment. <ul style="list-style-type: none"> • Resources currently assigned to Section • Resources en-route and/or ordered for Section • Incident facilities, types and location • Incident objectives • Governor’s guidance • State Emergency Management Agency guidance • Political issues and sensitivities • Staging areas, camps, area field offices and other incident facilities • Information from other personnel responsible for the section or area of responsibility prior to your arrival, if applicable • Review FEMA/State Agreement if approved 	I		
3. Obtain initial direction from the immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies • Current State and local priorities 	I		

4. Identify issues and concerns of potential relevance to your assignment.	I		
5. Attend and participate in the initial IMAT meeting. <ul style="list-style-type: none"> • Current incident status • Obtain immediate supervisor priorities and expectations for the IMAT • Review roles and responsibilities of IMAT members • Resource ordering procedures • Public information strategy • Planning, logistics, and finance/admin procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Obtain schedule for briefings and meetings 	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
6. Demonstrate appropriate level of knowledge of ICS structure, principles, positions and ICS Forms.	I		
7. Maintain appropriate span of control.	I		
8. Use common terminology.	I		
9. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
10. Provide for the safety, welfare and accountability of all Section personnel.	D-1		
11. Recognize potentially hazardous situations.	D-1		
12. Communicate potentially hazardous situations.	D-1		
13. Use personal protective equipment (PPE) as issued.	D-1		
14. Safeguard property and equipment.	D-1		

15. Provide current information for the call-down roster.	D-1		
16. Maintain the integrity of the call down roster.	D-1		
17. Verify special precautions are taken when hazards exist.	D-1		
18. Develop and communicate emergency procedures consistent with the safety and security plans.	D-1		
19. Notify the Safety Officer of any accidents.	D-1		

Behavior/Activity: Gather, update, and apply situational information relevant to the incident			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
20. Attend and facilitate initial team meeting with FCO and Command & General staff. <ul style="list-style-type: none"> • Create agenda for initial team meeting • Current incident status • Obtain FCO/Team Leader priorities and expectations • Initial incident resource requirements • Review roles and responsibilities of team members • Ordering procedures • Public information strategy • Planning, logistics, and finance/admin agreements and procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Coordinate with OSC and FCO to set timeframes for briefings; the incident action planning cycle; planning and team meetings 	I		
21. Collect information from Planning Section Chief or other personnel responsible for the incident prior to your arrival. <ul style="list-style-type: none"> • Status of incident and assigned resources • Current Unit status • Information on incident facilities such as JFO, Staging Areas, camps, Area Field Offices and other incident facilities • Critical infrastructure • Essential elements of information (EEI) 	I		
22. Continuously monitor and evaluate the current situation. <ul style="list-style-type: none"> • Notify the Operations Section Chief if information indicates IAP is not meeting incident objectives • Identify concerns and issues • Keep key incident management personnel informed 	I		

23. Keep Command and General staff informed. <ul style="list-style-type: none"> • Current information • Significant changes • Significant decision and actions 	D-1		
24. Provide the Situation Unit Leader with Section information for situation report (SitRep).	D-1		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
25. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		
26. Consistently demonstrate professional and appropriate non-verbal communication. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
27. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
28. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
29. Share current information with coworkers and immediate supervisor.	I		

<p>30. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	I		
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Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>31. Exhibit principles of duty, integrity, and respect.</p> <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-1		
<p>32. Provide subordinates with how their assignments support the overall management of the incident.</p>	D-1		
<p>33. Establish work assignments and set priorities.</p>	D-1		
<p>34. Ensure effective coordination among units within the Section.</p>	D-1		
<p>35. Take corrective action when problems arise.</p>	D-1		
<p>36. Establish and communicate basic work guidelines.</p> <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-1		
<p>37. Keep subordinates informed of decisions, actions, and changes that affect them.</p>	D-1		

38. Provide continuous feedback on performance. <ul style="list-style-type: none"> Recognize and document superior performance Take corrective action and document poor performance 	D-1		
39. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> Conduct orientation sessions and arrange on-the-job training for new hires Arrange for training of assigned personnel to develop required skills Coach personnel so they can develop and maintain skills 	D-1		
40. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-1		
41. Prepare and discuss formal performance evaluations.	D-1		
42. Create a work environment that provides mutual respect and equal opportunity for Section personnel.	D-1		
43. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-1		
44. Monitor employee performance to assess the need for possible rest or rotation.	D-1		
45. Write performance appraisals and discuss the results with direct reports.	D-1		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
46. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
47. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.	I		
48. Cultivate professional relationships with coworkers and others to exchange information and work effectively.	I		
49. Represent FEMA in a professional manner when working with internal and external parties.	I		
50. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Coordinate with State to establish a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
51. Coordinate with State's Incident Management Team (IMT) Planning Section Chief and other appropriate State IMT members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
52. Unify with the State's planning section if possible, to facilitate the development of a single, joint IAP. <ul style="list-style-type: none"> • If unification is not possible, at minimum, collocate in the same facility • Be "participatory" - encourage the State's participation in incident action planning and problem solving • Accommodate the State's participation in planning section by fairly sharing work space • Ensure unit leaders work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
53. Determine if organizational structure is appropriate. <ul style="list-style-type: none"> • Size and complexity of the incident • Support needs of other functions • Coordination needs at the State level • Incident objectives and immediate supervisor direction • Emergency Support Functions (ESF) assigned • Coordination needs at the State and Local level 	D-1		
54. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Unity of Command • Proper ICS positions 	D-1		

55. Review the Incident Action Plan (IAP), other relevant plans, or Resources Unit records to identify resources assigned. <ul style="list-style-type: none"> • Location and status of assigned resources • Resource identifier, if assigned (i.e. Task Force #1) • Supervisor name and contact information • Location • Assignment • Resource kind and type 	D-1		
56. Check to ensure subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-1		
57. Discuss findings and recommendations with the immediate supervisor as necessary. <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses of resources • Issues and concerns • Facilities needs if applicable 	D-1		
58. Make any organizational adjustments necessary.	D-1		
59. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-1		
60. Request additional personnel, supplies, services, and equipment needed within the established ordering processes.	D-1		

Behavior/Activity: Establish and maintain the incident action planning process			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
61. Establish and maintain an incident planning cycle as agreed to at the initial briefing. <ul style="list-style-type: none"> • Post planning cycle (Planning “P”) in appropriate places • Disseminate the planning cycle to the FCO/Team leader, Command & General staff, and other appropriate personnel 	I		
62. Ensure Planning Section personnel participation in appropriate incident action planning process.	I		

Behavior/Activity: Participate in the incident action planning process, when requested			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
63. Anticipate the Section's support to Operations for the next operational period.	D-1		
64. Determine Section's support capabilities based on anticipated needs.	D-1		
65. Ensure Section's participation in the Operations Tactics Meeting when Section's support is required. <ul style="list-style-type: none"> • Discuss with OSC if Section's attendance is required • Identify additional Section resources needed to support the next O-period plan • If shortfalls exist, communicate to OSC 	D-1		
66. Attend the Command and General Staff Planning meeting. <ul style="list-style-type: none"> • Review IAP • Recommend corrections/adjustments to the IAP 	D-1		

Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Attend scheduled briefings as required.	D-1		
68. Brief direct reports on details on the Section's support to the IAP following the Operations briefing. <ul style="list-style-type: none"> • Remind direct reports that all supervisory personnel need to be briefed • Ensure assignments are clear and provide additional information needed • Discuss special safety considerations or situations 	D-1		

<p>69. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period • Needed readjustments to ongoing IAP assignments 	D-1		
<p>70. Brief immediate supervisor on results of debriefings.</p>	D-1		

<p>Behavior/Activity: Ensure participation in the development of appropriate plans</p>			
<p>Competency: Manage Development of Plans (C17)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>71. Participate in the preparation of incident plans.</p> <ul style="list-style-type: none"> • Strategic Plan • Functional Plans • Demobilization Plan • Evacuation Plans (incident personnel) • Continuity of Operations Plan (COOP) 	D-1		
<p>72. Solicit input from appropriate section personnel during the plan development and provide them an opportunity to review the draft document.</p>	D-1		

<p>Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments</p>			
<p>Competency: Incident Action Planning (C11); Manage Resources (C19)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>73. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.</p>	D-1		
<p>74. Hold personnel accountable for execution of assigned tasks.</p>	D-1		
<p>75. Delegate specific authority based on the assigned tasks to assigned Specialists.</p>	D-1		

76. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-1		
77. Request additional resources or release surplus resources.	D-1		
78. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-1		
79. Gather and analyze information to validate subordinate report of accomplishments.	D-1		
80. Ensure work completed is consistent with direction, policy, and incident objectives. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-1		
81. Keep assigned personnel informed of changes.	D-1		
82. Notify Resources Unit Leader of all resource status changes when they occur.	D-1		

Behavior/Activity: Coordinate with state, tribal, local, and other federal agency officials to ensure unity of effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
83. Identify and promptly resolve disagreements, issues, and misunderstandings.	D-1		
84. Share critical information with state, tribal and local officials.	D-1		
85. Take early action to mitigate or resolve coordination issues.	D-1		
86. Foster team work and emphasize a unified approach.	D-1		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the Incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
87. Maintain a log documenting significant decisions relating to the incident. <ul style="list-style-type: none"> • Activity Log (ICS 214) 	I		

<p>88. Maintain a personnel log.</p> <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		
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<p>Behavior/Activity: Ensure the situation room is set-up and maintained</p>			
<p>Competency: Attention to Detail (C3); Customer Focus (C6)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>89. Ensure that situation room is well organized and the required resources are in-place before each meeting.</p> <ul style="list-style-type: none"> • Large incident map with date and time • Incident objectives • Poster-size or digitally displayed (LCD) Operational Planning Worksheet (ICS 215) • Planning meeting agenda • LCD projector/computer, screen, video conferencing equipment, microphone, speaker phone, television and VCR (optional) • Other applicable status displays • Flip charts and felt-tip markers • White boards when available 	I		
<p>90. De-conflict usage of the situation room when necessary.</p>	I		

<p>Behavior/Activity: Facilitate incident action planning and other meetings as required</p>			
<p>Competency: Interpersonal Skills (C14); Manage & Organize Information (C18)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>91. Facilitate the Command & General staff meeting.</p> <ul style="list-style-type: none"> • Review and update Unified Coordination Group (UCG) objectives • Present current situation or delegate to Situation Unit Leader • Facilitate round-robin discussion regarding current status, shortfalls, limitations, constraints and concerns • Facilitate an open discussion 	I		

<p>92. Facilitate the Planning meeting.</p> <ul style="list-style-type: none"> • Prepare the meeting room • Maintain an accurate incident map depicting the current information and resource status information including points of distribution (POD), division boundaries, and incident facilities • Publish and distribute meeting agenda • Ensure support presentations are prepared by Planning Section personnel and duplicate as necessary • Facilitate the meeting in order to ensure the IAP meets incident objectives, Obtain Command & General staff commitment to support the plan, and Obtain FCO/Team Leader approval 	I		
<p>93. Facilitate other meetings as required.</p> <ul style="list-style-type: none"> • Transition meeting • Operations briefing • Contingency planning • Close out meetings 	I		

Behavior/Activity: Ensure the IAP is developed, published, and distributed within established timeframes			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
94. Assist operations elements with the preparation of the ICS 215) as necessary/requested in preparation for the operations tactics meeting.	D-1		
95. Ensure Planning Section participation at the operations tactics meeting to assist in and document the completion of the ICS 215 for development of Assignment List (ICS 204).	D-1		
96. Ensure the Resources Unit Leader develops the additional resource orders and places them with Ordering Unit Leader.	D-1		
97. Supervise the assembly of information into a draft IAP in preparation for review at the planning meeting.	D-1		
98. Ensure components of the IAP required from other organization elements, such as safety message, communications plan, medical plan, transportation plan, air operations summary and other special messages are collected and included.	D-1		
99. Obtain commitment from the Command & General staff to support the draft IAP at the planning meeting.	D-1		
100. Revise the draft IAP as appropriate based on input from planning meeting.	D-1		
101. Obtain approval/signature of FCO/Team Leader.	D-1		

<p>102. Ensure the approved IAP is published and distributed as appropriate.</p> <ul style="list-style-type: none"> • Hard copy, • Email, • HSIN etc. 	<p>D-1</p>		
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<p>Behavior/Activity: Manage the development of plans and assist other organizational elements as requested</p>			
<p>Competency: Manage Development of Plans (C17); Teamwork (C22)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>103. Supervise the development of plans</p> <ul style="list-style-type: none"> • Advanced Operations Plan (AOP) • Incident Functional Plans • COOP • Transition Plan • Demobilization Plan • Strategic Plan and Timeline • Other IFPs as requested 	<p>I</p>		
<p>104. Assist other organization elements in developing Incident Functional Plans as requested.</p>	<p>I</p>		

<p>Behavior/Activity: Ensure required/requested reports, briefings and geospatial information products are complete, accurate and distributed appropriately</p>			
<p>Competency: Attention to Detail (C3)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>105. Ensure Incident Status Summary (ICS 209) is accurate and complete and distributed within established timeframes.</p>	<p>D-1</p>		
<p>106. Ensure other reports are accurate and complete and distributed within established timeframes.</p> <ul style="list-style-type: none"> • Disaster Summary (DISUM), • Initial Operating Report (IOR) • Fact Sheet 	<p>D-1</p>		
<p>107. Assist and support GIS Unit Leader to acquire and configure necessary server.</p>	<p>D-1</p>		

108. Provide for a quality assurance review of all Planning products prior to dissemination. <ul style="list-style-type: none"> • Accuracy • Timeliness • Completeness 	D-1		
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Behavior/Activity: Direct the use of information systems as appropriate			
Competency: Information Management (C13)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
109. Emphasize the consistent use of FEMA-approved information systems for information collection and dissemination.	I		
110. Utilize other systems to best meet incident information needs and reporting requirements.	I		

Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
111. Negotiate time of transfer.	I		
112. Provide for adequate overlap to ensure efficient transfer of duties.	I		
113. Brief replacement on current situation.	I		
114. Ensure appropriate information is up-to-date.	I		
115. Ensure an effective transfer of duties is accomplished.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
116. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
117. Ensure that closeout records are current, accurate, and complete. <ul style="list-style-type: none"> • Chronology • Situation Report • Demobilization Plan 	D-3		
118. Oversee disposal of non-archived files and materials and shred sensitive data.	I		
119. Transfer official files to appropriate Region.	I		
120. Maintain a “chain of custody” on all records and documents at closeout	I		
121. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
122. Obtain performance appraisal from supervisor.	I		
123. Make return travel arrangements.	I		
124. Prepare the final travel voucher.	I		
125. Return accountable property to the Accountable Property Office (APO).	I		
126. Submit final timesheet, appraisal form, and travel voucher.	I		
127. Check out with the Automated Deployment Database (ADD).	I		
128. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Planning Section Chief Type I (PSC1)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Planning Section Chief Type I (PSC1)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Planning Section Chief Type I (PSC1)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Planning Section Chief Type II (PSC2)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed during the first 72 hours of the assignment in a personal go-kit. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Position job aids if available • Stafford Act • Planning CD • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Common Responsibilities (Chapter 2, IMH).	I		
4. Ensure agency identification (badge) is current or have two (2) forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/State agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant situational information on your assignment. <ul style="list-style-type: none"> • Resources currently assigned to Section • Resources en-route and/or ordered for Section • Incident facilities, types and location • Incident objectives • Governor’s guidance • State Emergency Management Agency guidance • Political issues and sensitivities • Staging areas, camps, area field offices and other incident facilities • Information from other personnel responsible for the section or area of responsibility prior to your arrival, if applicable • Review FEMA/State Agreement if approved 	I		
9. Obtain initial direction from the immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies • Current State and local priorities 	I		
10. Identify issues and concerns of potential relevance to your assignment.	I		

<p>11. Attend and participate in the initial IMAT meeting.</p> <ul style="list-style-type: none"> • Current incident status • Obtain immediate supervisor priorities and expectations for the IMAT • Review roles and responsibilities of IMAT members • Resource ordering procedures • Public information strategy • Planning, logistics, and finance/admin procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Obtain schedule for briefings and meetings 	I		
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Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
12. Demonstrate appropriate level of knowledge of ICS structure, principles, positions and ICS Forms.	I		
13. Maintain appropriate span of control.	I		
14. Use common terminology.	I		
15. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
16. Provide for the safety, welfare and accountability of all Section personnel.	D-2		
17. Recognize potentially hazardous situations.	D-2		
18. Communicate potentially hazardous situations.	D-2		
19. Use personal protective equipment (PPE) as issued.	D-2		
20. Safeguard property and equipment.	D-2		
21. Provide current information for the call-down roster.	D-2		
22. Maintain the integrity of the call down roster.	D-2		

23. Verify special precautions are taken when hazards exist.	D-2		
24. Develop and communicate emergency procedures consistent with the safety and security plans.	D-2		
25. Notify the Safety Officer of any accidents.	D-2		

Behavior/Activity: Gather, update, and apply situational information relevant to the incident			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
26. Attend and facilitate initial team meeting with FCO and Command & General staff. <ul style="list-style-type: none"> • Create agenda for initial team meeting • Current incident status • Obtain FCO/Team Leader priorities and expectations • Initial incident resource requirements • Review roles and responsibilities of team members • Ordering procedures • Public information strategy • Planning, logistics, and finance/admin agreements and procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Coordinate with OSC and FCO to set timeframes for briefings; the incident action planning cycle; planning and team meetings 	I		
27. Collect information from Planning Section Chief or other personnel responsible for the incident prior to your arrival. <ul style="list-style-type: none"> • Status of incident and assigned resources • Current Unit status • Information on incident facilities such as JFO, Staging Areas, camps, Area Field Offices and other incident facilities • Critical infrastructure • Essential elements of information (EEI) 	I		
28. Continuously monitor and evaluate the current situation. <ul style="list-style-type: none"> • Notify the Operations Section Chief if information indicates IAP is not meeting incident objectives • Identify concerns and issues • Keep key incident management personnel informed 	I		

<p>29. Keep command and general staff informed.</p> <ul style="list-style-type: none"> • Current information • Significant changes • Significant decision and actions 	D-2		
<p>30. Provide the Situation Unit Leader with Section information for situation report (SitRep).</p>	D-2		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>31. Consistently demonstrate professional and appropriate verbal communication.</p> <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		
<p>32. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>33. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>34. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>35. Share current information with coworkers and immediate supervisor.</p>	I		

<p>36. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	I		
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Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>37. Exhibit principles of duty, integrity, and respect.</p> <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-2		
<p>38. Provide subordinates with how their assignments support the overall management of the incident.</p>	D-2		
<p>39. Establish work assignments and set priorities.</p>	D-2		
<p>40. Take corrective action when problems arise.</p>	D-2		
<p>41. Establish and communicate basic work guidelines.</p> <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-2		
<p>42. Keep subordinates informed of decisions, actions, and changes that affect them.</p>	D-2		
<p>43. Provide continuous feedback on performance.</p> <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-2		

44. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for training of assigned personnel to develop required skills • Coach personnel so they can develop and maintain skills 	D-2		
45. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-2		
46. Prepare and discuss formal performance evaluations.	D-2		
47. Create a work environment that provides mutual respect and equal opportunity for Section personnel.	D-2		
48. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-2		
49. Monitor employee performance to assess the need for possible rest or rotation.	D-2		
50. Write performance appraisals and discuss the results with direct reports.	D-2		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
51. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
52. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary's nondiscrimination policy.	I		
53. Cultivate professional relationships with coworkers and others to exchange information and work effectively.	I		
54. Represent FEMA in a professional manner when working with internal and external parties.	I		
55. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Coordinate with State to establish a unified planning effort Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
56. Coordinate with State’s Incident Management Team (IMT) Planning Section Chief and other appropriate State IMT members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
57. Unify with the State’s planning section if possible, to facilitate the development of a single, joint IAP. <ul style="list-style-type: none"> • If unification is not possible, at minimum, collocate in the same facility • Be “participatory” - encourage the State’s participation in incident action planning and problem solving • Accommodate the State’s participation in planning section by fairly sharing work space • Ensure unit leaders work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
58. Determine if organizational structure is appropriate. <ul style="list-style-type: none"> • Incident objectives and immediate supervisor direction • Emergency Support Functions (ESF) assigned • Coordination needs at the State and Local level 	D-2		
59. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Unity of Command • Proper ICS positions 	D-2		

<p>60. Review the Incident Action Plan (IAP), other relevant plans, or Resources Unit records to identify resources assigned.</p> <ul style="list-style-type: none"> • Location and status of assigned resources • Resource identifier, if assigned (i.e. Task Force #1) • Supervisor name and contact information • Location • Assignment • Resource kind and type 	D-2		
<p>61. Check to ensure subordinates are qualified to perform in assigned positions.</p> <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-2		
<p>62. Discuss findings and recommendations with the immediate supervisor as necessary.</p> <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses of resources • Issues and concerns • Facilities needs if applicable 	D-2		
<p>63. Make any organizational adjustments necessary.</p>	D-2		
<p>64. Keep immediate supervisor and assigned personnel informed of organizational changes.</p>	D-2		
<p>65. Request additional personnel, supplies, services, and equipment needed within the established ordering processes.</p>	D-2		

<p>Behavior/Activity: Establish and maintain the incident action planning process</p>			
<p>Competency: Incident Action Planning (C11)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>66. Establish and maintain an incident planning cycle as agreed to at the initial briefing.</p> <ul style="list-style-type: none"> • Post planning cycle (Planning “P”) in appropriate places • Disseminate the planning cycle to the FCO/Team leader, Command & General staff, and other appropriate personnel 	I		
<p>67. Ensure Planning Section personnel participation in appropriate incident action planning process.</p>	I		

Behavior/Activity: Participate in the incident action planning process, when requested			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
68. Anticipate the Section’s support to Operations for the next operational period.	D-2		
69. Determine Section’s support capabilities based on anticipated needs.	D-2		
70. Ensure Section’s participation in the Operations Tactics Meeting when Section’s support is required. <ul style="list-style-type: none"> • Discuss with OSC if Section’s attendance is required • Identify additional Section resources needed to support the next O-period plan • If shortfalls exist, communicate to OSC 	D-2		
71. Attend the Command and General Staff Planning meeting. <ul style="list-style-type: none"> • Review IAP • Recommend corrections/adjustments to the IAP 	D-2		

Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
72. Attend scheduled briefings as required.	D-2		
73. Brief direct reports on details on the Section’s support to the IAP following the Operations briefing. <ul style="list-style-type: none"> • Remind direct reports that all supervisory personnel need to be briefed • Ensure assignments are clear and provide additional information needed • Discuss special safety considerations or situations 	D-2		

<p>74. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period • Needed readjustments to ongoing IAP assignments 	D-2		
75. Brief immediate supervisor on results of debriefings.	D-2		

Behavior/Activity: Ensure participation in the development of appropriate plans			
Competency: Manage Development of Plans (C17)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>76. Participate in the preparation of incident plans.</p> <ul style="list-style-type: none"> • Strategic Plan • Functional Plans • Demobilization Plan • Evacuation Plans (incident personnel) • Continuity of Operations Plan (COOP) 	D-2		
77. Solicit input from appropriate section personnel during the plan development and provide them an opportunity to review the draft document.	D-2		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
78. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-2		
79. Hold personnel accountable for execution of assigned tasks.	D-2		
80. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-2		

81. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-2		
82. Request additional resources or release surplus resources.	D-2		
83. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-2		
84. Gather and analyze information to validate subordinate report of accomplishments.	D-2		
85. Ensure work completed is consistent with direction, policy, and incident objectives. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-2		
86. Keep assigned personnel informed of changes.	D-2		
87. Notify Resources Unit Leader of all resource status changes when they occur.	D-2		

Behavior/Activity: Coordinate with state, tribal, local, and other federal agency officials to ensure unity of effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
88. Identify and promptly resolve disagreements, issues, and misunderstandings.	D-2		
89. Share critical information with state, tribal and local officials.	D-2		
90. Take early action to mitigate or resolve coordination issues.	D-2		
91. Foster team work and emphasize a unified approach.	D-2		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
92. Maintain a log documenting significant decisions relating to the incident. <ul style="list-style-type: none"> • Activity Log (ICS 214) 	I		

<p>93. Maintain a personnel log.</p> <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		
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<p>Behavior/Activity: Ensure the situation room is set-up and maintained</p>			
<p>Competency: Attention to Detail (C3); Customer Focus (C6)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>94. Ensure that situation room is well organized and the required resources are in-place before each meeting.</p> <ul style="list-style-type: none"> • Large incident map with date and time • Incident objectives • Poster-size or digitally displayed (LCD) Operational Planning Worksheet (ICS 215) • Planning meeting agenda • LCD projector/computer, screen, video conferencing equipment, microphone, speaker phone, television and VCR (optional) • Other applicable status displays • Flip charts and felt-tip markers • White boards when available 	I		
<p>95. De-conflict usage of the situation room when necessary.</p>	I		

<p>Behavior/Activity: Facilitate incident action planning and other meetings as required</p>			
<p>Competency: Interpersonal Skills (C14); Manage & Organize Information (C18)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>96. Facilitate the Command & General staff meeting.</p> <ul style="list-style-type: none"> • Review and update Unified Coordination Group (UCG) objectives • Present current situation or delegate to Situation Unit Leader • Facilitate round-robin discussion regarding current status, shortfalls, limitations, constraints and concerns • Facilitate an open discussion 	I		

<p>97. Facilitate the Planning meeting.</p> <ul style="list-style-type: none"> • Prepare the meeting room • Maintain an accurate incident map depicting the current information and resource status information including points of distribution (POD), division boundaries, and incident facilities • Publish and distribute meeting agenda • Ensure support presentations are prepared by Planning Section personnel and duplicate as necessary • Facilitate the meeting in order to ensure the IAP meets incident objectives, Obtain Command & General staff commitment to support the plan, and Obtain FCO/Team Leader approval 	I		
<p>98. Facilitate other meetings as required.</p> <ul style="list-style-type: none"> • Transition meeting • Operations briefing • Contingency planning • Close out meetings 	I		

<p>Behavior/Activity: Ensure the IAP is developed, published, and distributed within established timeframes</p>			
<p>Competency: Incident Action Planning (C11)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>99. Assist operations elements with the preparation of the ICS 215 as necessary/requested in preparation for the operations tactics meeting.</p>	D-2		
<p>100. Ensure Planning Section participation at the operations tactics meeting to assist in and document the completion of the ICS 215 for development of Assignment List (ICS 204).</p>	D-2		
<p>101. Ensure the Resources Unit Leader develops the additional resource orders and places them with Ordering Unit Leader.</p>	D-2		
<p>102. Supervise the assembly of information into a draft IAP in preparation for review at the planning meeting.</p>	D-2		
<p>103. Ensure components of the IAP required from other organization elements, such as safety message, communications plan, medical plan, transportation plan, air operations summary and other special messages are collected and included.</p>	D-2		
<p>104. Obtain commitment from the Command & General staff to support the draft IAP at the planning meeting.</p>	D-2		
<p>105. Revise the draft IAP as appropriate based on input from planning meeting.</p>	D-2		
<p>106. Obtain approval/signature of FCO/Team Leader.</p>	D-2		

107. Ensure the approved IAP is published and distributed as appropriate. <ul style="list-style-type: none"> • Hard copy • Email • HSIN 	D-2		
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Behavior/Activity: Manage the development of plans and assist other organizational elements as requested			
Competency: Manage Development of Plans (C17); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
108. Supervise the development of plans. <ul style="list-style-type: none"> • Advanced Operations Plan (AOP) • Incident Functional Plans • COOP • Transition Plan • Demobilization Plan • Strategic Plan and Timeline • Other IFPs as requested 	I		
109. Assist other organization elements in developing Incident Functional Plans as requested.	I		

Behavior/Activity: Ensure required/requested reports, briefings and geospatial information products are complete, accurate and distributed appropriately			
Competency: Knowledge of Program & Technical Protocols (C15); Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
110. Ensure Incident Status Summary (ICS 209) is accurate and complete and distributed within established timeframes.	D-2		
111. Ensure other reports are accurate and complete and distributed within established timeframes. <ul style="list-style-type: none"> • Disaster Summary (DISUM) • Initial Operating Report (IOR) • Fact Sheet. 	D-2		
112. Assist and support GIS Unit Leader to acquire and configure necessary server.	D-2		

<p>113. Provide for a quality assurance review of all Planning products prior to dissemination.</p> <ul style="list-style-type: none"> • Accuracy • Timeliness • Completeness 	<p>D-2</p>		
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<p>Behavior/Activity: Direct the use of information systems as appropriate</p>			
<p>Competency: Information Management (C13)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>114. Emphasize the consistent use of FEMA-approved information systems for information collection and dissemination.</p>	<p>I</p>		
<p>115. Utilize other systems to best meet incident information needs and reporting requirements.</p>	<p>I</p>		

<p>Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement</p>			
<p>Competency: Planning & Organizing (C20)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>116. Negotiate time of transfer.</p>	<p>I</p>		
<p>117. Provide for adequate overlap to ensure efficient transfer of duties.</p>	<p>I</p>		
<p>118. Brief replacement on current situation.</p>	<p>I</p>		
<p>119. Ensure appropriate information is up-to-date.</p>	<p>I</p>		
<p>120. Ensure an effective transfer of duties is accomplished.</p>	<p>I</p>		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
121. Obtain performance appraisal from supervisor.	I		
122. Report to the Training Unit upon completion of training assignment.	I		
123. Make return travel arrangements.	I		
124. Prepare the final travel voucher.	I		
125. Return accountable property to the Accountable Property Office (APO).	I		
126. Submit final timesheet, appraisal form, and travel voucher.	I		
127. Check out with the Automated Deployment Database (ADD).	I		
128. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Planning Section Chief Type II (PSC2)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Planning Section Chief Type II (PSC2)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Planning Section Chief Type II (PSC2)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Planning Section Chief Type III (PSC3)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed during the first 72 hours of the assignment in a personal go-kit <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Position job aids if available 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Common Responsibilities (Chapter 2, IMH).	I		
4. Ensure agency identification (badge) is current or have two (2) forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/State agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		

<p>7. Obtain additional job-required equipment or supplies.</p> <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		
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<p>Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment</p> <p>Competency: Researching Information (C21)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>8. Obtain relevant situational information on your assignment.</p> <ul style="list-style-type: none"> • Resources currently assigned to Section • Resources en-route and/or ordered for Section • Incident facilities, types and location • Incident objectives • Governor’s guidance • State Emergency Management Agency guidance • Political issues and sensitivities • Staging areas, camps, area field offices and other incident facilities • Information from other personnel responsible for the section or area of responsibility prior to your arrival, if applicable • Review FEMA/State Agreement if approved 	I		
<p>9. Obtain initial direction from the immediate supervisor concerning your assignment.</p> <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies • Current State and local priorities 	I		
<p>10. Identify issues and concerns of potential relevance to your assignment.</p>	I		

<p>11. Attend and participate in the initial IMAT meeting.</p> <ul style="list-style-type: none"> • Current incident status • Obtain immediate supervisor priorities and expectations for the IMAT • Review roles and responsibilities of IMAT members • Resource ordering procedures • Public information strategy • Planning, logistics, and finance/admin procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Obtain schedule for briefings and meetings 	I		
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Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
12. Demonstrate appropriate level of knowledge of ICS structure, principles, positions and ICS Forms.	I		
13. Maintain appropriate span of control.	I		
14. Use common terminology.	I		
15. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
16. Provide for the safety, welfare and accountability of all Section personnel.	D-3		
17. Recognize potentially hazardous situations.	D-3		
18. Communicate potentially hazardous situations.	D-3		
19. Use personal protective equipment (PPE) as issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster.	D-3		

23. Verify special precautions are taken when hazards exist.	D-3		
24. Develop and communicate emergency procedures consistent with the safety and security plans.	D-3		
25. Notify the Safety Officer of any accidents.	D-3		

Behavior/Activity: Gather, update, and apply situational information relevant to the incident			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
26. Attend and facilitate initial team meeting with FCO and Command & General staff. <ul style="list-style-type: none"> • Create agenda for initial team meeting • Current incident status • Obtain FCO/Team Leader priorities and expectations • Initial incident resource requirements • Review roles and responsibilities of team members • Ordering procedures • Public information strategy • Planning, logistics, and finance/admin agreements and procedures • Jurisdictional limitations, concerns and restrictions • Safety and security concerns • Special incident considerations • Coordinate with OSC and FCO to set timeframes for briefings; the incident action planning cycle; planning and team meetings 	I		
27. Collect information from Planning Section Chief or other personnel responsible for the incident prior to your arrival. <ul style="list-style-type: none"> • Status of incident and assigned resources • Current Unit status • Information on incident facilities such as JFO, Staging Areas, camps, Area Field Offices and other incident facilities • Critical infrastructure • Essential elements of information (EEI) 	I		
28. Continuously monitor and evaluate the current situation. <ul style="list-style-type: none"> • Notify the Operations Section Chief if information indicates IAP is not meeting incident objectives • Identify concerns and issues • Keep key incident management personnel informed 	I		

<p>29. Keep command and general staff informed.</p> <ul style="list-style-type: none"> • Current information • Significant changes • Significant decision and actions 	D-3		
<p>30. Provide the Situation Unit Leader with Section information for situation report (SitRep).</p>	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>31. Consistently demonstrate professional and appropriate verbal communication.</p> <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		
<p>32. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>33. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>34. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>35. Share current information with coworkers and immediate supervisor.</p>	I		

<p>36. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	I		
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Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>37. Exhibit principles of duty, integrity, and respect.</p> <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
<p>38. Provide subordinates with how their assignments support the overall management of the incident.</p>	D-3		
<p>39. Establish work assignments and set priorities.</p>	D-3		
<p>40. Take corrective action when problems arise.</p>	D-3		
<p>41. Establish and communicate basic work guidelines.</p> <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
<p>42. Keep subordinates informed of decisions, actions, and changes that affect them.</p>	D-3		

43. Provide continuous feedback on performance. <ul style="list-style-type: none"> Recognize and document superior performance Take corrective action and document poor performance 	D-3		
44. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> Conduct orientation sessions and arrange on-the-job training for new hires Arrange for training of assigned personnel to develop required skills Coach personnel so they can develop and maintain skills 	D-3		
45. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
46. Prepare and discuss formal performance evaluations.	D-3		
47. Create a work environment that provides mutual respect and equal opportunity for Section personnel.	D-3		
48. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
49. Monitor employee performance to assess the need for possible rest or rotation.	D-3		
50. Write performance appraisals and discuss the results with direct reports.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
51. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
52. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary's nondiscrimination policy.	I		
53. Cultivate professional relationships with coworkers and others to exchange information and work effectively.	I		
54. Represent FEMA in a professional manner when working with internal and external parties.	I		
55. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Coordinate with State to establish a unified planning effort Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
56. Coordinate with State’s Incident Management Team (IMT) Planning Section Chief and other appropriate State IMT members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
57. Unify with the State’s planning section if possible, to facilitate the development of a single, joint IAP. <ul style="list-style-type: none"> • If unification is not possible, at minimum, collocate in the same facility • Be “participatory” - encourage the State’s participation in incident action planning and problem solving • Accommodate the State’s participation in planning section by fairly sharing work space • Ensure unit leaders work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
58. Determine if organizational structure is appropriate. <ul style="list-style-type: none"> • Size and complexity of the incident • Support needs of other functions • Coordination needs at the State level • Incident objectives and immediate supervisor direction • Emergency Support Functions (ESF) assigned • Coordination needs at the State and Local level 	D-3		
59. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Unity of Command • Proper ICS positions 	D-3		

<p>60. Review the Incident Action Plan (IAP), other relevant plans, or Resources Unit records to identify resources assigned.</p> <ul style="list-style-type: none"> • Location and status of assigned resources • Resource identifier, if assigned (i.e. Task Force #1) • Supervisor name and contact information • Location • Assignment • Resource kind and type 	D-3		
<p>61. Check to ensure subordinates are qualified to perform in assigned positions.</p> <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-3		
<p>62. Discuss findings and recommendations with the immediate supervisor as necessary.</p> <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses of resources • Issues and concerns • Facilities needs if applicable 	D-3		
<p>63. Make any organizational adjustments necessary.</p>	D-3		
<p>64. Keep immediate supervisor and assigned personnel informed of organizational changes.</p>	D-3		
<p>65. Request additional personnel, supplies, services, and equipment needed within the established ordering processes.</p>	D-3		

<p>Behavior/Activity: Establish and maintain the incident action planning process</p>			
<p>Competency: Incident Action Planning (C11)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>66. Establish and maintain an incident planning cycle as agreed to at the initial briefing.</p> <ul style="list-style-type: none"> • Post planning cycle (Planning “P”) in appropriate places • Disseminate the planning cycle to the FCO/Team leader, Command & General staff, and other appropriate personnel 	I		
<p>67. Ensure Planning Section personnel participation in appropriate incident action planning process.</p>	I		

Behavior/Activity: Participate in the incident action planning process, when requested			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
68. Anticipate the Section’s support to Operations for the next operational period.	D-3		
69. Determine Section’s support capabilities based on anticipated needs.	D-3		
70. Ensure Section’s participation in the Operations Tactics Meeting when Section’s support is required. <ul style="list-style-type: none"> • Discuss with OSC if Section’s attendance is required • Identify additional Section resources needed to support the next O-period plan • If shortfalls exist, communicate to OSC 	D-3		
71. Attend the Command and General Staff Planning meeting. <ul style="list-style-type: none"> • Review IAP • Recommend corrections/adjustments to the IAP 	D-3		

Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
72. Attend scheduled briefings as required.	D-3		
73. Brief direct reports on details on the Section’s support to the IAP following the Operations briefing. <ul style="list-style-type: none"> • Remind direct reports that all supervisory personnel need to be briefed • Ensure assignments are clear and provide additional information needed • Discuss special safety considerations or situations 	D-3		

<p>74. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period • Needed readjustments to ongoing IAP assignments 	D-3		
75. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Ensure participation in the development of appropriate plans			
Competency: Manage Development of Plans (C17)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>76. Participate in the preparation of incident plans.</p> <ul style="list-style-type: none"> • Strategic Plan • Functional Plans • Demobilization Plan • Evacuation Plans (incident personnel) • Continuity of Operations Plan (COOP) 	D-3		
77. Solicit input from appropriate section personnel during the plan development and provide them an opportunity to review the draft document.	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
78. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
79. Hold personnel accountable for execution of assigned tasks.	D-3		
80. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-3		

81. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
82. Request additional resources or release surplus resources.	D-3		
83. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
84. Gather and analyze information to validate subordinate report of accomplishments.	D-3		
85. Ensure work completed is consistent with direction, policy, and incident objectives. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
86. Keep assigned personnel informed of changes.	D-3		
87. Notify Resources Unit Leader of all resource status changes when they occur.	D-3		

Behavior/Activity: Coordinate with state, tribal, local, and other federal agency officials to ensure unity of effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
88. Identify and promptly resolve disagreements, issues, and misunderstandings.	D-3		
89. Share critical information with state, tribal and local officials.	D-3		
90. Take early action to mitigate or resolve coordination issues.	D-3		
91. Foster team work and emphasize a unified approach.	D-3		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the Incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
92. Maintain a log documenting significant decisions relating to the incident. <ul style="list-style-type: none"> • Activity Log (ICS 214) 	I		
93. Maintain a personnel log. <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		

Behavior/Activity: Ensure the situation room is set-up and maintained			
Competency: Attention to Detail (C3); Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
94. Ensure that situation room is well organized and the required resources are in-place before each meeting. <ul style="list-style-type: none"> • Large incident map with date and time • Incident objectives • Poster-size or digitally displayed (LCD) Operational Planning Worksheet (ICS 215) • Planning meeting agenda • LCD projector/computer, screen, video conferencing equipment, microphone, speaker phone, television and VCR (optional) • Other applicable status displays • Flip charts and felt-tip markers • White boards when available 	I		
95. De-conflict usage of the situation room when necessary.	I		

Behavior/Activity: Facilitate incident action planning and other meetings as required Competency: Interpersonal Skills (C14); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
96. Facilitate the Command & General staff meeting. <ul style="list-style-type: none"> • Review and update Unified Coordination Group (UCG) objectives • Present current situation or delegate to Situation Unit Leader • Facilitate round-robin discussion regarding current status, shortfalls, limitations, constraints and concerns • Facilitate an open discussion 	I		
97. Facilitate the Planning meeting. <ul style="list-style-type: none"> • Prepare the meeting room • Maintain an accurate incident map depicting the current information and resource status information including points of distribution (POD), division boundaries, and incident facilities • Publish and distribute meeting agenda • Ensure support presentations are prepared by Planning Section personnel and duplicate as necessary • Facilitate the meeting in order to ensure the IAP meets incident objectives, Obtain Command & General staff commitment to support the plan, and Obtain FCO/Team Leader approval 	I		
98. Facilitate other meetings as required. <ul style="list-style-type: none"> • Transition meeting • Operations briefing • Contingency planning • Close out meetings 	I		

Behavior/Activity: Ensure the IAP is developed, published, and distributed within established timeframes			
Competency: Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
99. Ensure planning staff completes required elements of the Incident Action Plan (IAP) within required timeframes. <ul style="list-style-type: none"> • Support operations elements with the preparation of the ICS 215 • Ensure the Resources Unit supports the Operation's Tactics Meeting • Ensure the Planning Support Unit compiles the IAP for review at the planning meeting • Oversee revisions of the draft IAP as appropriate based on input from planning meeting • Obtain approval/signature of UCG • Ensure the final IAP is published and distributed 	I		

Behavior/Activity: Manage the development of plans and assist other organizational elements as requested			
Competency: Manage Development of Plans (C17); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
100. Supervise the development of plans. <ul style="list-style-type: none"> • Advanced Operations Plan (AOP) • Incident Functional Plans • COOP • Transition Plan • Demobilization Plan • Strategic Plan and Timeline • Other IFPs as requested 	I		
101. Assist other organization elements in developing Incident Functional Plans as requested.	I		

Behavior/Activity: Ensure all Planning products are complete, accurate and distributed appropriately			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
102. Provide for a quality assurance review of all Planning products prior to dissemination. <ul style="list-style-type: none"> • Accuracy • Timeliness • Completeness 	I		

Behavior/Activity: Direct the use of information systems as appropriate			
Competency: Information Management (C13)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
103. Emphasize the consistent use of FEMA-approved information systems for information collection and dissemination.	I		
104. Utilize other systems to best meet incident information needs and reporting requirements.	I		

Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
105. Negotiate time of transfer.	I		
106. Provide for adequate overlap to ensure efficient transfer of duties.	I		
107. Brief replacement on current situation.	I		
108. Ensure appropriate information is up-to-date.	I		
109. Ensure an effective transfer of duties is accomplished.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
110. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
111. Ensure that closeout records are current, accurate, and complete. <ul style="list-style-type: none"> • Chronology • Situation Report • Demobilization Plan 	D-3		
112. Oversee disposal of non-archived files and materials and shred sensitive data.	I		
113. Transfer official files to appropriate Region.	I		
114. Maintain a “chain of custody” on all records and documents at closeout.	I		
115. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
116. Obtain performance appraisal from supervisor.	I		
117. Report to the Training Unit upon completion of training assignment.	I		
118. Make return travel arrangements.	I		
119. Prepare the final travel voucher.	I		
120. Return accountable property to the Accountable Property Office (APO).	I		
121. Submit final timesheet, appraisal form, and travel voucher.	I		
122. Check out with the Automated Deployment Database (ADD).	I		
123. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Planning Section Chief Type III (PSC3)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Planning Section Chief Type III (PSC3)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Planning Section Chief Type III (PSC3)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Resources Unit Leader (RESL)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest ↓	D - 1 D - 2 D - 3	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
↓ Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES

1. **Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. **The Trainee** is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. **The Evaluator** is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		

<p>7. Obtain additional job-required equipment or supplies.</p> <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		
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<p>Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment</p> <p>Competency: Researching Information (C21)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>8. Obtain relevant information on your assignment.</p> <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Resources currently assigned • Resources en-route and/or ordered • Incident facilities, types and location 	I		
<p>9. Obtain initial direction from your immediate supervisor concerning your assignment.</p> <ul style="list-style-type: none"> • Current priorities • Incident objectives • strategies 	I		
<p>10. Identify topics, issues and concerns of potential relevance to your assignment.</p>	I		

<p>Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes</p> <p>Competency: Incident Command System Concepts (C12)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>11. Demonstrate appropriate level of ICS knowledge.</p> <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
<p>12. Use common terminology.</p>	I		

13. Maintain appropriate span of control.	I		
14. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
15. Provide for the safety, security, welfare and accountability of subordinates.	D-3		
16. Recognize and communicate potentially hazardous situations.	D-3		
17. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
18. Verify special precautions are taken when hazards exist.	D-3		
19. Use personal protective equipment (PPE) when issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster of subordinates.	D-3		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine if organizational structure is appropriate based on supervisor direction.	D-3		
24. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> • Span of control • Proper ICS positions 	D-3		
25. Ensure that subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> • FEMA Qualification System (FQS) • Non-FEMA Agency qualified 	D-3		

26. Discuss findings and recommendations with the immediate supervisor. <ul style="list-style-type: none"> • Organizational structure • Shortages or surpluses • Issues and concerns • Facility needs if applicable 	D-3		
27. Make any organizational adjustments if necessary.	D-3		
28. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-3		
29. Request additional personnel, supplies, services, and equipment needed.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		
31. Consistently demonstrate professional and appropriate non-verbal communication. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
32. Establish and maintain positive interpersonal and interagency working relationships with: <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
33. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
34. Share current information with coworkers and immediate supervisor.	D-3		

<p>35. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		
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Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
36. Attend scheduled briefings as required.	D-3		
<p>37. Brief subordinates with relevant information on their assignments and check for understanding.</p> <ul style="list-style-type: none"> • Discuss special safety considerations or hazards situations • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	D-3		
<p>38. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
39. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
41. Hold personnel accountable for execution of assigned tasks.	D-3		
42. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-3		
43. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
44. Request additional resources or release surplus resources.	D-3		
45. Address logistical problems reported by subordinates.	D-3		
46. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
47. Gather and analyze information to validate subordinate report of accomplishments.	D-3		
48. Ensure work completed is consistent with direction and policy. <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
49. Keep assigned personnel informed of changes.	D-3		
50. Notify immediate supervisor of Unit personnel status changes when they occur.	D-3		
51. Make recommendations for next operational period to immediate supervisor.	D-3		

Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
53. Explain how Unit's assignments fit into the context of the bigger picture.	D-3		
54. Establish work assignments and set priorities.	D-3		
55. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
56. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
57. Provide continuous feedback on performance. <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-3		
58. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for training of assigned personnel to develop required skills • Coach personnel in developing and maintaining skills 	D-3		
59. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
60. Prepare and discuss formal performance evaluations with subordinates.	D-3		

61. Create a work environment that provides mutual respect and equal opportunity for all Unit personnel.	D-3		
62. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
63. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
65. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences.	I		
66. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Manage the check-in process			
Competency: Attention to Detail (C3); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Establish check-in function at appropriate incident facilities. <ul style="list-style-type: none"> • IOF • JFO • Area Field Offices • Camps 	I		
68. Establish check-in procedures using the Incident Check-In List (ICS 211) and status databases.	I		
69. Ensure check-in/check-out information on all resources including commodities at Staging Areas is received per an established schedule.	I		
70. Establish a process to collect check-in from locations where check-in has not been established.	I		

Behavior/Activity: Manage resource status process			
Competency: Attention to Detail (C3); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
71. Maintain the status and location of all resources (personnel, equipment, and Initial Response Resources).	I		
72. Maintain a master roster of all resources checked-in to the incident. <ul style="list-style-type: none"> Interact with all organizational elements such as, section chiefs, Branch Directors, and Division/Group Supervisors, and appropriate contacts at incident facilities to maintain resource status 	I		
73. Use spreadsheets, databases or other appropriate formats to record current status of resources.	I		

Behavior/Activity: Participate in the incident action planning process			
Competency: Incident Action Planning (C11); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
74. Provide immediate supervisor with a listing of resources currently assigned, en route, and/or ordered for the Incident Briefing.	I		
75. Participate in the Operations Tactics Meeting. <ul style="list-style-type: none"> Provide a current resource inventory Identify additional resources needed and excess resources Capture and document inputs and adjustments to Operational Planning Worksheet (ICS 215) 	I		
76. Attend the Planning Meeting and provide resource information as requested.	I		
77. Ensure Assignment Lists (ICS 204) are properly prepared using the approved ICS 215.	I		
78. Direct the preparation of Organization Assignment List (ICS 203), Communications List (ICS 205A), and Incident Organization Chart (ICS 207) for IAP.	I		
79. Attend the Operations Briefing and provide resource information as requested.	I		

Behavior/Activity: Provide information on resources (including status) and reports as directed by the Section Chief			
Competency: Attention to Detail (C3); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
80. Provide resource status to the Situation Unit Leader for Incident Status Summary (ICS 209).	I		
81. Provide resource information to organizational elements as requested.	I		
82. Provide the GIS Unit with resource information needed for geospatial products.	I		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the Incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
83. Maintain a log documenting significant unit decisions relating to the incident, e.g. Activity Log (ICS 214).	I		
84. Maintain a unit personnel log. <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		

Behavior/Activity: Coordinate with State counterpart in a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
85. Coordinate with State’s Incident Management Team (IMT) Situation Unit Leader and other appropriate State planning section members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
86. Be “participatory” - encourage the State’s participation in unit activities. <ul style="list-style-type: none"> • Accommodate the State’s participation in the unit by fairly sharing work space when collocated or unified • Ensure subordinates work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
87. Negotiate time of transition.	I		
88. Provide for adequate overlap to ensure efficient transfer of duties.	I		
89. Brief replacement on current situation.	I		
90. Ensure appropriate information is up-to-date. <ul style="list-style-type: none"> • Accurate • Special issues/concerns 	I		
91. Ensure an effective transition of duties is accomplished.	I		
92. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
93. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
94. Submit appropriate current, accurate and complete records to immediate supervisor.	D-3		
95. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
96. Obtain performance appraisal from supervisor.	I		
97. Report to the Training Unit at completion of training assignment.	I		
98. Make return travel arrangements.	I		
99. Prepare the final travel voucher.	I		
100. Return accountable property to the Accountable Property Office (APO).	I		
101. Submit final timesheet, appraisal form, and travel voucher.	I		
102. Check out with the Automated Deployment Database (ADD).	I		
103. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Resources Unit Leader (RESL)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Resources Unit Leader (RESL)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Resources Unit Leader (RESL)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Reports Specialist (RESP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Planning Field Operations Guide • Stafford Act • Planning CD • HSIN/COP User Guide • Property issued for use on the incident including appropriate hand receipts for accountable property 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location • Special safety considerations or hazardous situations 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives Work expectations • Security considerations • Safety considerations 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>19. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>20. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>21. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>22. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>23. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	I		
<p>24. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	I		
<p>25. Exhibit appropriate public stewardship of taxpayer dollars.</p>	I		

<p>Behavior/Activity: Prepare reports as assigned</p>			
<p>Competency: Attention to Detail (C3)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>26. Gather information and prepare the Initial Operating Report (IOR) Fact Sheets.</p>	I		

27. Gather information and prepare Incident Status Summary (ICS 209) and Spot Reports as assigned.	I		
28. Develop and maintain Incident Chronology.	I		
29. Write reports that are logical, organized, and grammatically correct.	I		

Behavior/Activity: Record meeting minutes for official records as assigned			
Competency: Attention to Detail (C3); Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Take minutes at FCO/SCO Command and General Staff meetings and prepare documentation for official records. <ul style="list-style-type: none"> • Hand written notes • Transcription from audio 	I		
31. Take minutes at the Planning meeting and prepare documentation for official records.	I		
32. Take minutes at other meetings as assigned and prepare documentation for official records.	I		

Behavior/Activity: Manage incident documentation			
Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
33. Set up and maintain a record and non-record file management system using the agency- approved format.	I		
34. Obtain official disaster documents for permanent record. <ul style="list-style-type: none"> • FEMA- State Agreement • Declaration documents • Federal Register notices and amendments 	I		
35. Set up and manage electronic filing system for the Planning Section.	I		

<p>36. Protect sensitive materials.</p> <ul style="list-style-type: none"> • For Official Use Only (FOUO) • Law Enforcement Sensitive • Sensitive but unclassified 	I		
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<p>Behavior/Activity: Distribute and post information as directed</p>			
<p>Competency: Attention to Detail (C3)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>37. Set up and maintain distribution lists.</p> <ul style="list-style-type: none"> • Email • Hard copy 	I		
<p>38. Post information to identified sites.</p> <ul style="list-style-type: none"> • Common drive • HSIN • SharePoint 	I		

<p>Behavior/Activity: Effectively transition position duties to replacement</p>			
<p>Competency: Planning & Organizing (C20)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>39. Find out time of transition from immediate supervisor.</p>	I		
<p>40. Identify appropriate information needed for transition of duties.</p> <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
<p>41. Notify immediate supervisor when transition is complete.</p>	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
42. Obtain performance appraisal from supervisor.	I		
43. Report to the Training Unit at completion of training assignment.	I		
44. Make return travel arrangements.	I		
45. Prepare the final travel voucher.	I		
46. Return accountable property to the Accountable Property Office (APO).	I		
47. Submit final timesheet, appraisal form, and travel voucher.	I		
48. Check out with the Automated Deployment Database (ADD).	I		
49. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Reports Specialist (RESP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Reports Specialist (RESP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Reports Specialist (RESP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Resources Specialist (RSSP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest ↓	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Stafford Act • Planning CD • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated Incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a Trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location • Special safety considerations or hazardous situations 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Current situation • Assigned workspace • Security considerations • Incident objectives 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		

<p>19. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>20. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>21. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>22. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>23. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	I		
<p>24. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	I		
<p>25. Exhibit appropriate public stewardship of taxpayer dollars.</p>	I		

<p>Behavior/Activity: Prepare and maintain designated Incident Action Plan Forms</p>			
<p>Competency: Attention to Detail (C3)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>26. Prepare and maintain the Organization Assignment List (ICS 203).</p>	I		

27. Prepare and maintain the Communications List (ICS 205A).	I		
28. Prepare and maintain the Incident Organization Chart (ICS 207).	I		

Behavior/Activity: Support the Incident Action Planning process			
Competency: Attention to Detail (C3); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
29. Participate in the Tactics Meeting in support of the Resources Unit Leader to capture and document inputs and adjustments to Operational Planning Worksheet (ICS 215) when requested.	I		
30. Transfer information from the approved ICS 215 to the Assignment List (ICS 204).	I		
31. Provide ICS 203, ICS 204, ICS 205A, and ICS 207 to the Planning Support Unit for inclusion in the IAP.	I		

Behavior/Activity: Assist the Resources Unit Leader in providing resource information to other organizational elements			
Competency: Attention to Detail (C3); Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
32. Provide the Documentation Unit Leader resource status for the Incident Status Summary (ICS 209).	I		
33. Provide resource information to various organizational elements as requested.	I		
34. Provide the GIS Unit with resource information needed for geospatial products.	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
35. Find out time of transition from immediate supervisor.	I		
36. Identify appropriate information needed for transition of duties. <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
37. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
38. Obtain performance appraisal from supervisor.	I		
39. Report to the Training Unit at completion of training assignment.	I		
40. Make return travel arrangements.	I		
41. Prepare the final travel voucher.	I		
42. Return accountable property to the Accountable Property Office (APO).	I		
43. Submit final timesheet, appraisal form, and travel voucher.	I		
44. Check out with the Automated Deployment Database (ADD).	I		
45. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
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Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
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Evaluation Record

Resources Specialist (RSSP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
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Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
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<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Resources Specialist (RSSP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
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Evaluator's office address & phone:		
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FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Resources Specialist (RSSP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Status / Check-In Recorder (SCKN)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

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DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
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CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest ↓	D - 1 D - 2 D - 3	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
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A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
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- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
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2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a trainee.	I		

<p>7. Obtain additional job-required equipment or supplies.</p> <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		
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<p>Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment</p> <p>Competency: Researching Information (C21)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>8. Obtain relevant information on your assignment.</p> <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	I		
<p>9. Obtain initial direction from your immediate supervisor concerning your assignment.</p> <ul style="list-style-type: none"> • Current priorities • Incident objectives • Work expectations • Security considerations • Safety considerations 	I		
<p>10. Identify topics, issues and concerns of potential relevance to your assignment.</p>	I		

<p>Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes</p> <p>Competency: Incident Command System Concepts (C12)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>11. Demonstrate appropriate level of ICS knowledge.</p> <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
<p>12. Use common terminology.</p>	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Recognize potentially hazardous situations and report them to immediate supervisor.	I		
14. Advise coworkers of potentially hazardous situations where appropriate.	I		
15. Use personal protective equipment (PPE) when issued.	I		
16. Safeguard property and equipment.	I		
17. Provide current information for the call-down roster.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Respectful word choices • Be clear and concise • Minimize use of acronyms 	I		
19. Consistently demonstrate professional and appropriate non-verbal communication. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
20. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
21. Share current information with coworkers and immediate supervisor.	D-3		

<p>22. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	<p>D-3</p>		
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<p>Behavior/Activity: Establish and maintain positive and ethical behaviors</p>			
<p>Competency: Ethics & Integrity (C9)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>23. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.</p>	<p>I</p>		
<p>24. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences in accordance with the Under Secretary’s nondiscrimination policy.</p>	<p>I</p>		
<p>25. Exhibit appropriate public stewardship of taxpayer dollars.</p>	<p>I</p>		

<p>Behavior/Activity: Check in resources assigned to the incident</p>			
<p>Competency: Attention to Detail (C3)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>26. Establish check-in function at designated incident facility.</p> <ul style="list-style-type: none"> • IOF • JFO • Staging Areas • Area Field Office • Camps 	<p>I</p>		
<p>27. Obtain required work materials, including Incident Check-In List(s) (ICS 211) and status databases.</p>			
<p>28. Post signs so that arriving resources can easily find incident check-in locations.</p>			

29. Check in incident personnel and collect required information. <ul style="list-style-type: none"> • Request source • Name of personnel • Position on incident • Home office or agency • Contact numbers • Lodging information 	I		
30. Record data accurately and transfer to Resources Unit in established schedule.	I		
31. Direct personnel checking in to appropriate work location or Resources Unit.	I		

Behavior/Activity: Maintain and display the status of incident resources and commodities using the established resources status protocol			
Competency: Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
32. Utilize resource tracking inventory systems to display current status of assigned resources and commodities. <ul style="list-style-type: none"> • Resource Status Cards (ICS 219) • Databases • Spreadsheets 	I		
33. Provide resource summary reports to Planning Section Units and other Sections as directed.	I		

Behavior/Activity: When assigned to Staging Area, organize and maintain the check-in/check-out station			
Competency: Attention to Detail (C3); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
34. Ensure signs are posted to clearly identify the station and that proper safety measures are in place.	I		
35. Set up and maintain procedure for check in of commodities and resources. <ul style="list-style-type: none"> • Commodity trucks • All Staging Area personnel • Equipment • Visitors 	I		

36. Report current status of assigned commodities and resources on a regular, pre-arranged schedule or as directed.	I		
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Behavior/Activity: Check-in/Check-out Resources at the Staging Area			
Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
37. Collect record and maintain required information. <ul style="list-style-type: none"> • Commodity trucks • Incident personnel • Equipment • Visitors 	I		
38. Maintains check-in/check-out list for all personnel and submit all gate records as directed.	I		
39. Transmit check-in/check-out information to the Resources Unit on regular prearranged schedule or as needed.	I		

Behavior/Activity: Assist with demobilization process			
Competency: Attention to Detail (C3); Teamwork (C22)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. Develop list of excess resources.	I		
41. Collect check-out information. <ul style="list-style-type: none"> • Ensure Check-Out Form is complete • Destination (home or next assignment) • Estimated date/time of departure from the incident • Estimated date/time of arrival at destination • Type of transportation 	I		
42. Enter demobilization information into the resource status system.	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
43. Find out time of transition from immediate supervisor.	I		
44. Identify appropriate information needed for transition of duties. <ul style="list-style-type: none"> • Up-to-date • Accurate • Special issues/concerns 	I		
45. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
46. Obtain performance appraisal from supervisor.	I		
47. Report to the Training Unit at completion of training assignment.	I		
48. Make return travel arrangements.	I		
49. Prepare the final travel voucher.	I		
50. Return accountable property to the Accountable Property Office (APO).	I		
51. Submit final timesheet, appraisal form, and travel voucher.	I		
52. Check out with the Automated Deployment Database (ADD).	I		
53. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Status / Check-In Recorder (SCKN)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Status / Check-In Recorder (SCKN)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
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FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Status / Check-In Recorder (SCKN)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Situation Unit Leader (SITL)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

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3. **The Evaluator** is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current Program Guidance • Appropriate Forms (FEMA and ICS) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronym & Terms book (FAAT) • Planning Field Operations Manual 9330.1 • Planning CD • Stafford Act • HSIN/COP User Guide 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, Common Responsibilities.	I		
4. Ensure agency identification (badge) is current or have 2 forms of federally recognized pictured identification. <ul style="list-style-type: none"> • Drivers license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check-in at designated incident check- in location and complete check-in packet.	I		
6. Report to the Training Unit to check-in as a trainee.	I		
7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
8. Obtain relevant information on your assignment. <ul style="list-style-type: none"> • Organization of Incident operations (i.e., geographical, functional or combination of both) • Resources currently assigned • Resources en-route and/or ordered • Incident facilities, types and location 	I		
9. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies • Safety considerations 	I		
10. Identify topics, issues and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
11. Demonstrate appropriate level of ICS knowledge. <ul style="list-style-type: none"> • Organization structure • Principles • Positions • ICS Forms 	I		
12. Use common terminology.	I		
13. Maintain appropriate span of control.	I		
14. Maintain unity of command.	I		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
15. Provide for the safety, security, welfare and accountability of subordinates.	D-3		
16. Recognize and communicate potentially hazardous situations.	D-3		
17. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
18. Verify special precautions are taken when hazards exist.	D-3		
19. Use personal protective equipment (PPE) when issued.	D-3		
20. Safeguard property and equipment.	D-3		
21. Provide current information for the call-down roster.	D-3		
22. Maintain the integrity of the call down roster of subordinates.	D-3		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor's direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine if organizational structure is appropriate based on supervisor direction.	D-3		
24. Ensure organizational structure is ICS compliant. <ul style="list-style-type: none"> Span of control Proper ICS positions 	D-3		
25. Ensure that subordinates are qualified to perform in assigned positions. <ul style="list-style-type: none"> FEMA Qualification System (FQS) Non-FEMA Agency qualified 	D-3		
26. Discuss findings and recommendations with the immediate supervisor. <ul style="list-style-type: none"> Organizational structure Shortages or surpluses Issues and concerns Facility needs if applicable 	D-3		
27. Make any organizational adjustments if necessary.	D-3		
28. Keep immediate supervisor and assigned personnel informed of organizational changes.	D-3		
29. Request additional personnel, supplies, services, and equipment needed.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
30. Consistently demonstrate professional and appropriate verbal communication. <ul style="list-style-type: none"> Use common terminology Avoid slang or other confusing terminology Respectful word choices Be clear and concise Minimize use of acronyms 	I		

<p>31. Consistently demonstrate professional and appropriate non-verbal communication.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>32. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>33. Establish and maintain positive interpersonal and interagency working relationships.</p> <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESF) • Counterparts at all levels 	I		
<p>34. Share current information with coworkers and immediate supervisor.</p>	D-3		
<p>35. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

<p>Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings</p>			
<p>Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>36. Attend scheduled Briefings as required.</p>	D-3		
<p>37. Brief subordinates with relevant information on their assignments and check for understanding.</p> <ul style="list-style-type: none"> • Discuss special safety considerations or hazards situations • Organization of Incident operations (i.e., geographical, functional or combination of both) • Incident facilities, types and location 	D-3		

<p>38. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right – what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
39. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
40. Ensure assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
41. Hold personnel accountable for execution of assigned tasks.	D-3		
42. Delegate specific authority based on the assigned tasks to assigned Specialists.	D-3		
43. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
44. Request additional resources or release surplus resources.	D-3		
45. Address logistical problems reported by subordinates.	D-3		
46. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
47. Gather and analyze information to validate subordinate report of accomplishments.	D-3		
<p>48. Ensure work completed is consistent with direction and policy.</p> <ul style="list-style-type: none"> • Immediate supervisor direction • FEMA policies 	D-3		
49. Keep assigned personnel informed of changes.	D-3		
50. Notify immediate supervisor of Unit personnel status changes when they occur.	D-3		
51. Make recommendations for next operational period to immediate supervisor.	D-3		

Behavior/Activity: Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
53. Explain how Unit's assignments fit into the context of the bigger picture.	D-3		
54. Establish work assignments and set priorities.	D-3		
55. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Staggering of work hours 	D-3		
56. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
57. Provide continuous feedback on performance. <ul style="list-style-type: none"> • Recognize and document superior performance • Take corrective action and document poor performance 	D-3		
58. Ensure that personnel receive needed training and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for training of assigned personnel to develop required skills • Coach personnel in developing and maintaining skills 	D-3		
59. Ensure all personnel time records are complete, accurate and submitted within established timeframes.	D-3		
60. Prepare and discuss formal performance evaluations with subordinates.	D-3		

61. Create a work environment that provides mutual respect and equal opportunity for all Unit personnel.	D-3		
62. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
63. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
65. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation and other individual differences.	I		
66. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Set-up and maintain the situation room			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
67. Ensure that situation room is well organized and the required resources are in-place before each meeting. <ul style="list-style-type: none"> • Large incident map with date and time • Incident objectives • Poster-size or digitally displayed (LCD) Operational Planning Worksheet (ICS 215) • Planning meeting agenda • LCD projector/computer, screen, video conferencing equipment, microphone, speaker phone, television and VCR (optional) • Other applicable status displays • Flip charts and felt-tip makers • White boards when available 	I		
68. De-conflict usage of the situation room.	I		

Behavior/Activity: Prepare, implement, and maintain the information collection plan			
Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
69. Identify the appropriate Essential Elements of Information (EEI).	I		
70. Develop the incident information collection strategy and begin collecting and analyzing incident data.	I		
71. Obtain the Critical Information Requirements (CIR).	I		
72. Identify critical and optional sources of information.	I		
73. Implement the plan early and revise the plan as necessary.	I		
74. Publicize the information collection plan.	I		

Behavior/Activity: Gather, update, and apply situational information relevant to the incident			
Competency: Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
75. Gather current incident status information.	I		
76. Obtain timeframes for briefings; the incident action planning cycle; planning and team meetings.	I		
77. Collect information for the incident. <ul style="list-style-type: none"> • Status of incident and assigned resources • Current Unit status • Information on incident facilities such as JFO, Staging Areas, camps, Area Field Offices and other incident facilities • Critical infrastructure • Essential elements of information (EEI) 	I		
78. Continuously monitor and evaluate the current situation.	I		

Behavior/Activity: Document in writing all significant decisions and facts relative to activities on the Incident			
Competency: Communication-Written (C5)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
79. Maintain a log documenting significant unit decisions relating to the incident.	I		
80. Maintain a unit personnel log. <ul style="list-style-type: none"> • Staff deployment and demobilization schedule • Rotations • Counseling recommendations and actions • Evaluation completion 	I		

Behavior/Activity: Prepare and ensure that incident information products are complete, accurate and distributed appropriately			
Competency: Attention to Detail (C3)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
81. Ensure that information is processed, analyzed, posted, and distributed appropriately. <ul style="list-style-type: none"> • Validate all information • Assign incomplete or ambiguous information for follow up • Post information to appropriate displays 	I		
82. Develop trend analysis charts.	I		
83. Produce and distribute reports and briefings. <ul style="list-style-type: none"> • Informational summaries as needed • Situation briefings • Executive briefings • VIP briefings 	I		
84. Develop and distribute jurisdictional profiles as needed.	I		
85. Produce, post, update, and distribute situational awareness products. <ul style="list-style-type: none"> • Incident maps • Damage Assessment Chart • Predictive modeling maps 	I		

86. Provide support to other organizational programs, sections, and units in developing charts and graphs, as requested. <ul style="list-style-type: none"> • Recovery Program Charts • Shelter Status Chart • DRC Status Chart 	I		
87. Coordinate with the Geospatial Information Systems Unit Leader (GISL) in the development of situation maps.	I		
88. Provide validated input to the Documentation Unit for necessary reports in a timely manner.	I		

Behavior/Activity: Utilize information systems for Incident information management			
Competency: Information Management (C13)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
89. Ensure effective use of internal and external information management systems. <ul style="list-style-type: none"> • Homeland Security Information Network (HSIN) • Emergency Management Information Management System (EMIMS) • Emergency Management Mission Integrated Environment (EMMIE) 	I		
90. Coordinate with state counterparts to obtain permission to share state disaster systems. <ul style="list-style-type: none"> • Web EOC 	I		
91. Utilize existing information sharing platforms. <ul style="list-style-type: none"> • Share Point 	I		

Behavior/Activity: Participate in the Incident Action Planning process/cycle as appropriate			
Competency: Communication-Verbal (C4); Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
92. Participate in planning meetings as required. <ul style="list-style-type: none"> • Provide updates on current situation at the Command and General Staff Meeting • Provide updates on current situation at the Planning Meeting 	I		
93. Prepare Incident Objectives (ICS 202) for the Incident Action Plan (IAP).	I		
94. Collect weather daily for briefings and inclusion in the IAP.	I		

Behavior/Activity: Coordinate with State counterpart in a unified planning effort			
Competency: Ethics & Integrity (C9); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
95. Coordinate with State's Incident Management Team (IMT) Situation Unit Leader and other appropriate State planning section members. <ul style="list-style-type: none"> • Establish and maintain open and effective communications • Identify and promptly resolve disagreements, issues, and misunderstandings • Share critical information and contingency plans • Be pro-active in anticipating coordination issues early and take action to mitigate or resolve • Foster team work 	I		
96. Be "participatory" - encourage the State's participation in unit activities. <ul style="list-style-type: none"> • Accommodate the State's participation in the unit by fairly sharing work space when collocated or unified • Ensure subordinates work in a cooperative manner with State counterparts 	I		

Behavior/Activity: Effectively transition position duties to replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
97. Negotiate time of transition.	I		
98. Provide for adequate overlap to ensure efficient transfer of duties.	I		
99. Brief replacement on current situation.	I		
100. Ensure appropriate information is up-to-date. <ul style="list-style-type: none"> • Accurate • Special issues/concerns 	I		
101. Ensure an effective transition of duties is accomplished.	I		
102. Notify immediate supervisor when transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
103. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
104. Submit appropriate current, accurate and complete records to immediate supervisor.	D-3		
105. Submit items for the Remedial Action Management Program (RAMP) to immediate supervisor.	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
106. Obtain performance appraisal from supervisor.	I		
107. Report to the Training Unit at completion of training assignment.	I		
108. Make return travel arrangements.	I		
109. Prepare the final travel voucher.	I		

110. Return accountable property to the Accountable Property Office (APO).	I		
111. Submit final timesheet, appraisal form, and travel voucher.	I		
112. Check out with the Automated Deployment Database (ADD).	I		
113. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Situation Unit Leader (SITL)

 TRAINEE NAME

 TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Situation Unit Leader (SITL)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do **NOT** complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Situation Unit Leader (SITL)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Geospatial Information System Manager (GIMG)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current program guidance • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronyms, Abbreviations and Terms (FAAT) book • Position job aids if available 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name, and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, “Common Responsibilities.”	I		
4. Ensure agency identification (badge) is current or have two forms of federally recognized picture identification. <ul style="list-style-type: none"> • Driver’s license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check in at designated incident check-in location and complete check-in packet.	I		

6. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Air Card, if applicable 	I		
7. Report to the Training Unit to check in as a trainee.	I		
8. Check in with the Automated Deployment Database (ADD).	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
9. Obtain information relevant to your assignment. <ul style="list-style-type: none"> • Resources currently assigned • Resources en route and/or ordered • Incident facilities, types, and location • Anticipated workload 	I		
10. Obtain initial direction from your immediate supervisor concerning your assignment. <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies 	I		
11. Identify topics, issues, and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Ensure that organizational structure and staffing are adequate to meet immediate supervisor’s direction			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
12. Determine if organizational structure is appropriate based on supervisor’s direction.	D-3		

13. Ensure organizational structure is Incident Command System (ICS) compliant. <ul style="list-style-type: none"> • Span of control • Proper ICS positions 	D-3		
14. Review the Incident Action Plan (IAP), other relevant plans or the Planning Section's Resource Unit to identify resources assigned by type and quantity. <ul style="list-style-type: none"> • Supervisor name and contact information • Location • Assignment 	D-3		
15. Ensure that personnel are qualified to perform assigned positions.	D-3		
16. Make any organizational adjustments if necessary.	D-3		
17. Keep immediate supervisor and assigned personnel informed of changes.	D-3		
18. Request additional personnel, supplies, services, and equipment needed within the established ordering processes.	D-3		

Behavior/Activity: Determine requirements and acquire resources			
Competency: Manage Resources (C19; Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
19. Request, coordinate, and deploy internal and external personnel through Planning Section Chief. <ul style="list-style-type: none"> • Agency deployment system • Federal mission assignments/interagency agreements • Contracts 	D-3		
20. Order, inventory, and maintain equipment and supplies. <ul style="list-style-type: none"> • Inventory list of current supplies • Equipment and supplies received in working condition • Track equipment orders 	I		

Behavior/Activity: Operate specialized hardware and software applications			
Competency: Knowledge of Program & Technical Protocols (C15)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
21. Operate specialized application or geospatial software for disaster support. <ul style="list-style-type: none"> • Adobe products • ArcGIS desktop • Google Earth • Spatial Analyst • Microsoft Office suite 	I		
22. Operate and calibrate Global Positioning System (GPS) units and mobile data collection devices. <ul style="list-style-type: none"> • Handheld GPS devices • Tablet computing devices 	I		

Behavior/Activity: Provide geospatial coordination and customer service			
Competency: Customer Focus (C6); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
23. Determine and manage customer expectations for products. <ul style="list-style-type: none"> • Delivery time frames • Product requirements • Deliverables • Geospatial product request forms 	D-3		
24. Coordinate with appropriate stakeholders to prevent duplication of effort and to promote information sharing. <ul style="list-style-type: none"> • Regional Geospatial Coordinators • FEMA Headquarters Geospatial Coordinators • Air Operations Branch, if established • Federal, state, and local agencies • Private sector, as appropriate 	I		
25. Brief customers on geospatial capabilities and activities. <ul style="list-style-type: none"> • Command and general staff • Geospatial support to decision-makers • Opportunities to apply and develop geospatial products across program areas • Interpretation of products 	I		

<p>26. Set geospatial priorities based on incident requirements.</p> <ul style="list-style-type: none"> • Situation Unit requirements • Incident Action Plan (IAP) • Unified Coordination Group (UCG) • State requirements • Information Collection Plan (ICP) 	D-3		
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Behavior/Activity: Provide remote sensing coordination			
Competency: Customer Focus (C6); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>27. Identify potential needs for remote sensing support across functional areas.</p> <ul style="list-style-type: none"> • Emergency Services • External Affairs • Hazard Mitigation • Individual Assistance • Logistics • Long-Term Recovery & Planning • Planning • Public Assistance/Infrastructure 	D-3		
<p>28. Identify local, state, and federal remote sensing capabilities and assets.</p>	I		
<p>29. Prioritize Areas of Interest (AOI) in coordination with appropriate authorities.</p> <ul style="list-style-type: none"> • State requests • Operations Section Chief 	D-3		
<p>30. Submit requirements to FEMA National or Regional Remote Sensing Coordinators.</p> <ul style="list-style-type: none"> • Action Request Form (ARF) • Verbal or written requests 	D-3		
<p>31. Maintain close coordination with the Regional and National Remote Sensing Coordinators.</p>	I		

Behavior/Activity: Oversee management and analysis of geospatial data			
Competency: Manage & Organize Information (C18); Analysis/Reasoning (C2)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
32. Implement data management process and ensure staff adheres to procedures. <ul style="list-style-type: none"> • File directory structure • Metadata • Mission support areas • Dynamic event data 	D-3		
33. Maintain geospatial databases.	I		
34. Identify and share approved data sets with stakeholders. <ul style="list-style-type: none"> • Federal, state, and local organizations • Other FEMA program areas • Private Sector • Public 	I		
35. Provide direction to staff on proper use and interpretation of geospatial data and decision support tools.	I		
36. Ensure plans and procedures are established for data backup in coordination with information technology (IT).	I		
37. Integrate event-specific data into regional/national data warehouse.	I		

Behavior/Activity: Manage completion and distribution of geospatial products			
Competency: Information Management (C13); Customer Focus (C6)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
38. Review products for accuracy, timeliness, and completeness. <ul style="list-style-type: none"> • Quality assurance • Quality control • Grammar and spelling • Cartographic representation • Disclaimer 	I		

<p>39. Manage workflow production, update, and distribution of geospatial products.</p> <ul style="list-style-type: none"> • Situation Unit requirements • Digital (Homeland Security Information Network [HSIN], Situational Awareness viewers, etc.) • Hard copies • Staff meetings • Work assignments • Conference calls 	D-3		
<p>40. Utilize models (if available) in coordination with authoritative sources.</p> <ul style="list-style-type: none"> • Simple language • Explanation of model biases or variations to decision-makers • Relevance to decision-makers 	D-3		
<p>41. Ensure products are developed within established time frames.</p> <ul style="list-style-type: none"> • Product request status • Product request completion 	I		
<p>42. Develop key geospatial products in at least six functional areas.</p> <ul style="list-style-type: none"> • Emergency Services • External Affairs • Hazard Mitigation • Individual Assistance • Logistics • Long-Term Recovery & Planning • Planning • Public Assistance/Infrastructure 	I		

<p>Behavior/Activity: Comply with established policy and protocols</p>			
<p>Competency: Dependability (C8)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>43. Supervise adherence to copyright, disclaimers, licensing and other sensitive products and data distribution protocols.</p> <ul style="list-style-type: none"> • Data license/end-user agreement (e.g., Homeland Security Infrastructure Program) • Commercial imagery license • Sensitive state and federal data (e.g., environmental data) • For Official Use Only (FOUO) • Personally Identifiable Information (PII) • Subject Matter Experts (SME) for authoritative data 	D-3		

44. Follow or establish standard conventions for files, layouts, and templates.	I		
45. Ensure that Geospatial Information System Unit-specific considerations are included in the Continuity of Operations Plan (COOP).	I		
46. Implement procedures as defined in current standards and doctrine.	I		
47. Maintain accurate information and reports on geospatial requests and production.	I		
48. Provide Documentation Unit with products for archiving. <ul style="list-style-type: none"> • Per FEMA Records Management policy 	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
49. Demonstrate appropriate level of knowledge of ICS structure, principles, positions, and ICS forms.	I		
50. Maintain appropriate span of control.	I		
51. Use common terminology.	I		
52. Maintain unity of command.	I		

Behavior/Activity: Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
53. Attend scheduled briefings as required.	D-3		
54. Brief assigned subordinates. <ul style="list-style-type: none"> • Ensure that all direct subordinates receive a briefing • Ensure assignments are clear and provide additional information needed • Discuss special safety considerations or situations 	D-3		

<p>55. Debrief your immediate staff at the end of the operational period to gather information.</p> <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right—what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
56. Brief immediate supervisor on results of debriefings.	D-3		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>57. Demonstrate professional and appropriate verbal communication consistently.</p> <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Choose respectful words • Be clear and concise • Minimize use of acronyms 	I		
<p>58. Demonstrate professional and appropriate non-verbal communication consistently.</p> <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
<p>59. Ask clarifying questions to ensure accurate understanding of directions.</p> <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
<p>60. Share current information with co-workers and immediate supervisor.</p>	D-3		

<p>61. Be an effective team player.</p> <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	<p>D-3</p>		
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<p>Behavior/Activity: Execute assigned tasks, assess progress, and make necessary adjustments</p>			
<p>Competency: Incident Action Planning (C11); Manage Resources (C19)</p>			
<p>TASK</p>	<p>CODE</p>	<p>RECORD NUMBER</p>	<p>EVALUATOR INITIALS</p>
<p>62. Hold personnel accountable for execution of assigned tasks.</p>	<p>D-3</p>		
<p>63. Make adjustments in response to new information, changing conditions, or unexpected obstacles.</p>	<p>D-3</p>		
<p>64. Ensure that assigned tasks and expectations for the operational period are reasonable and accurate.</p>	<p>D-3</p>		
<p>65. Hold personnel accountable for execution of assigned tasks.</p>	<p>D-3</p>		
<p>66. Delegate specific authority based on the assigned tasks to assigned specialists.</p>	<p>D-3</p>		
<p>67. Request additional resources or release surplus resources.</p>	<p>D-3</p>		
<p>68. Address logistical problems that subordinates report.</p>	<p>D-3</p>		
<p>69. Make appropriate decisions and/or adjustments based on analyzed and validated information.</p>	<p>D-3</p>		
<p>70. Gather and analyze information to validate subordinate report of accomplishments.</p>	<p>D-3</p>		
<p>71. Ensure work completed is consistent with direction and policy.</p> <ul style="list-style-type: none"> • Immediate supervisor direction • Stafford Act requirements • FEMA policies 	<p>D-3</p>		
<p>72. Keep assigned personnel informed of changes.</p>	<p>D-3</p>		
<p>73. Notify immediate supervisor of all resource status changes when they occur.</p>	<p>D-3</p>		
<p>74. Make recommendations for next operational period to immediate supervisor.</p>	<p>D-3</p>		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
75. Provide for the safety, welfare, and accountability of co-workers.	D-3		
76. Recognize potentially-hazardous situations.	D-3		
77. Communicate potentially-hazardous situations.	D-3		
78. Use personal protective equipment (PPE) as issued.	D-3		
79. Safeguard property and equipment.	D-3		
80. Provide current information for the call-down roster.	D-3		
81. Verify special precautions are taken when hazards exist.	D-3		
82. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		
83. Maintain the integrity of the call-down roster.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
84. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
85. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation, and other individual differences in accordance with the Under Secretary of Homeland Security's nondiscrimination policy.	I		
86. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Demonstrate effective supervisory and leadership principles Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
87. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
88. Explain each subordinate’s assignments in the context of the bigger picture.	D-3		
89. Establish work assignments and set priorities.	D-3		
90. Take corrective action when problems arise.	D-3		
91. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Call-down contact list • Staggering of work hours 	D-3		
92. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
93. Evaluate performance continuously.	D-3		
94. Communicate performance deficiencies immediately and take corrective action.	D-3		
95. Ensure that personnel receive needed training, mentoring, and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for ongoing training and professional development for assigned personnel to develop required skills • Coach personnel so they can develop and maintain skills • Provide subordinates with opportunities for development 	D-3		
96. Recognize effective individual and team performance.	D-3		

97. Ensure all personnel time records are complete, accurate, and submitted within established time frames.	D-3		
98. Prepare performance appraisals and discuss the results with direct reports.	D-3		
99. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	D-3		
100. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
101. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
102. Determine the time of transfer.	I		
103. Provide for adequate overlap to ensure efficient transfer of duties.	I		
104. Ensure that incident status information is up-to-date.	I		
105. Ensure that an effective transfer of duties is accomplished.	I		
106. Brief replacement on current situation.	I		
107. Notify immediate supervisor when the transition is complete.	I		

Behavior/Activity: Ensure a complete and effective closeout and/or transition at the termination of activities			
Competency: Manage Resources (C19); Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
108. Coordinate with immediate supervisor to develop and carry out a staff reduction plan.	D-3		
109. Submit appropriate current, accurate, and complete records to immediate supervisor.	D-3		
110. Submit items for the Remedial Action Management Program (RAMP).	D-3		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
111. Obtain performance appraisal from supervisor.	I		
112. Make return travel arrangements.	I		
113. Prepare final travel voucher.	I		
114. Return accountable property.	I		
115. Submit final timesheet, appraisal form, and travel voucher.	I		
116. Check out with Automated Deployment Database (ADD).	I		
117. Report to the Training Unit upon completion of training assignment.	I		
118. Check out with the IT Service Manager in the Communication Unit.	I		

Remote Sensing Specialty

Behavior/Activity: Prioritize, request, and coordinate remote sensing			
Competency: Analysis/Reasoning (C2); Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Identify requirements and essential elements of information (EEI) in coordination with appropriate authorities. <ul style="list-style-type: none"> • Information Collection Plan 	D-2		
2. Manage expectations of product deliverables and timelines. <ul style="list-style-type: none"> • Flight/acquisition schedules • Imagery resolution • Data processing, exploitation, and dissemination 	D-2		
3. Ensure adherence to interpretation standards.	D-2		
4. Manage remote sensing databases. <ul style="list-style-type: none"> • By sensor type, time, geographic area, and resolution • Data storage and scalability 	D-2		

Geospatial Database and Systems Specialty

Behavior/Activity: Implement, maintain, and coordinate spatial databases through IT enterprise architecture			
Competency: Analysis/Reasoning (C2); Information Management (C13)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Normalize and standardize unstructured data.	D-2		
2. Build and maintain data dictionaries. <ul style="list-style-type: none"> • Geospatial Data Model (GDM) 	D-2		
3. Communicate to customers data format requirements.	D-2		
4. Establish access rights and permissions through IT Coordinator. <ul style="list-style-type: none"> • National or Regional Geospatial Information System (GIS) Database Administrator 	D-2		
5. Manage spatial databases and web service architecture. <ul style="list-style-type: none"> • SQL • Oracle • Publishing services • Situational Awareness Viewers—data feeds 	D-2		
6. Identify opportunities for automation and scripting for routine data processing tasks.	D-2		
7. Ensure compliance with federal, departmental, and agency security-awareness protocols. <ul style="list-style-type: none"> • In coordination with IT/Logistics 	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Geospatial Information System Manager (GIMG)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Geospatial Information System Manager (GIMG)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Geospatial Information System Manager (GIMG)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Geospatial Information System Specialist (GISP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity:	Ensure readiness for assignment prior to deployment
Competency:	Dependability (C8)

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current program guidance • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) if applicable • FEMA Acronyms, Abbreviations and Terms (FAAT) book • Position job aids if available 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name, and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, “Common Responsibilities.”	I		
4. Ensure that agency identification (badge) is current or have two forms of federally recognized picture identification. <ul style="list-style-type: none"> • Driver’s license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check in at designated incident check-in location and complete check-in packet.	I		
6. Obtain agency identification (badge) or other government-issued identifications.	I		

7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Handheld GPS • Camera, if applicable • Office supplies • Maps • Air Card, if applicable 	I		
8. Report to the Training Unit to check in as a trainee.	I		
9. Check in with the Automated Deployment Database (ADD).	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
10. Obtain situational information relevant to your assignment.	I		
11. Obtain initial direction from your immediate supervisor concerning your assignment.	I		
12. Identify topics, issues, and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Manage geospatial data			
Competency: Information Management (C13); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Create, maintain, and update geospatial databases.	I		
14. Ensure that data is accurate and from authoritative sources.	I		
15. Import/export geospatial data. <ul style="list-style-type: none"> • Various coordinate systems (Geographic to United States National Grid) • Data • Projections 	I		

16. Perform basic geoprocessing and analytical tasks. <ul style="list-style-type: none"> • SQL queries • Comparisons, joins, parses, and relates • Buffer, intersect, and clip 	D-3		
17. Digitize and georeference data within Geospatial Information System (GIS) software. <ul style="list-style-type: none"> • Vector • Raster 	I		

Behavior/Activity: Generate geospatial products			
Competency: Analysis/Reasoning (C2); Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
18. Collect data from internal and external stakeholders to develop and update Geospatial products. <ul style="list-style-type: none"> • Incident maps • Reference maps (political jurisdiction maps and demographics) • Quantitative and qualitative thematic maps • Interactive map products (Keyhole Markup Language (ML), ArcReader, web mapping, etc.) 	I		
19. Integrate event-specific model output in coordination with authoritative sources. <ul style="list-style-type: none"> • Sea, Lake, and Overland Surges from Hurricanes (SLOSH) • Hazards U.S. (HAZUS) • Atmospheric transportation and dispersion models, such as Interagency Modeling and Atmospheric Advisory Center (IMAAC) • Hydrometeorological Precipitation Center (HPC) • National Infrastructure Simulation and Analysis Center (NISAC) 	I		
20. Develop key geospatial products in at least three functional areas. <ul style="list-style-type: none"> • Emergency Services • External Affairs • Hazard Mitigation • Individual Assistance • Logistics • Long-Term Recovery & Planning • Planning • Public Assistance/Infrastructure 	D-3		
21. Develop and update products within established time frames.	I		

Behavior/Activity: Comply with established policy and protocols			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
22. Adhere to copyright, disclaimers, licensing, and other sensitive products and data distribution protocols. <ul style="list-style-type: none"> • Per supervisor direction • Data license/end-user agreement (e.g., Homeland Security Infrastructure Program) • Commercial imagery license • Sensitive state and federal data (e.g., environmental data) • For Official Use Only (FOUO) • Personally Identifiable Information (PII) • Subject Matter Experts (SME) for authoritative data 	I		
23. Follow procedures as defined in current standards and doctrine.	I		
24. Use standard conventions for files, layouts, and templates as established for the incident.	I		

Behavior/Activity: Provide geospatial coordination and customer service			
Competency: Customer Focus (C6); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
25. Brief customers on interpretation of products.	I		
26. Assist customers with preparing product request forms.	I		
27. Track requests for completion.	I		
28. Distribute geospatial products. <ul style="list-style-type: none"> • Digital (Homeland Security Information Network [HSIN], Situational Awareness [SA] viewers, etc.) • Hard copies • Situation Unit 	I		

Behavior/Activity: Operate specialized hardware and software applications			
Competency: Knowledge of Program & Technical Protocols (C15)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
29. Operate and maintain desktop and wide-format printers.	I		
30. Operate specialized application or geospatial software for disaster support. <ul style="list-style-type: none"> • Adobe products • ArcGIS desktop • Google Earth • Spatial Analyst • Microsoft Office suite 	I		
31. Operate and calibrate Global Positioning System (GPS) units and mobile data collection devices. <ul style="list-style-type: none"> • Handheld GPS devices • Tablet computing devices 	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
32. Demonstrate appropriate level of knowledge of ICS structure, principles, and positions.	I		
33. Use common terminology.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
34. Demonstrate professional and appropriate verbal communication consistently. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Choose respectful words • Be clear and concise • Minimize use of acronyms 	I		
35. Demonstrate professional and appropriate non-verbal communication consistently. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
36. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
37. Share current information with co-workers and immediate supervisor.	D-3		
38. Be an effective team player. <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

Behavior/Activity: Follow established safety and security procedures Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
39. Provide for the safety, welfare, and accountability of co-workers.	D-3		
40. Recognize potentially-hazardous situations.	D-3		
41. Communicate potentially-hazardous situations.	D-3		

42. Use personal protective equipment (PPE) as issued.	D-3		
43. Safeguard property and equipment.	D-3		
44. Provide current information for the call-down roster.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
45. Maintain a high standard of ethics required of federal employees that is consistent with FEMA core values.	I		
46. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation, and other individual differences in accordance with the Under Secretary of Homeland Security's nondiscrimination policy.	I		
47. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
48. Determine the time of transfer.	I		
49. Provide for adequate overlap to ensure efficient transfer of duties.	I		
50. Ensure that incident status information is up-to-date.	I		
51. Ensure that an effective transfer of duties is accomplished.	I		

Behavior/Activity: Properly check out of the incident			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
52. Obtain performance appraisal from supervisor.	I		
53. Make return travel arrangements.	I		
54. Prepare final travel voucher.	I		
55. Return equipment to Accountable Property Officer (APO).	I		
56. Submit final timesheet, appraisal form, and travel voucher.	I		
57. Check out with Automated Deployment Database (ADD).	I		
58. Report to the Training Unit upon completion of training assignment.	I		
59. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Geospatial Information System Specialist (GISP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Geospatial Information System Specialist (GISP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
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	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
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FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Geospatial Information System Specialist (GISP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Geospatial Information Unit Leader (GIUL)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

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DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Activity (Behavior): Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current program guidance • Appropriate forms (FEMA and Incident Command System [ICS]) • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) • FEMA Acronyms, Abbreviations and Terms (FAAT) book • Position job aids if available 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name, and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, “Common Responsibilities.”	I		
4. Ensure that agency identification (badge) is current or have two forms of federally recognized picture identification. <ul style="list-style-type: none"> • Driver’s license • Passport • Federal/state agency identification 	I		

Activity (Behavior): Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check in at designated incident check-in location and complete check-in packet.	I		
6. Report to the Training Unit to check in as a trainee.	I		

<p>7. Obtain additional job-required equipment or supplies.</p> <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Office supplies • Maps • Air Card, if applicable 	I		
<p>8. Check in with the Automated Deployment Database (ADD).</p>	I		

<p>Activity (Behavior): Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment</p>			
<p>Competency: Researching Information (C21)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>9. Obtain information relevant to your assignment.</p> <ul style="list-style-type: none"> • Organization of incident operations (i.e., geographical, functional, or combination of both) • Resources currently assigned • Resources en route and/or ordered • Incident facilities, types, and location 	I		
<p>10. Obtain initial direction from your immediate supervisor concerning your assignment.</p> <ul style="list-style-type: none"> • Current priorities • Incident objectives • Strategies 	I		
<p>11. Identify topics, issues, and concerns of potential relevance to your assignment.</p>	I		

<p>Activity (Behavior): Determine requirements and acquire resources to establish the unit</p>			
<p>Competency: Manage Resources (C19); Planning & Organizing (C20)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>12. Determine field requirements for facility space for a well-organized unit.</p> <ul style="list-style-type: none"> • Staff planning for space allocation • Power/cooling 	D-2		

13. Request equipment through the Regional Geospatial Information Unit (GIU) Coordinator and IT Coordinator. <ul style="list-style-type: none"> • Special requirements for network connectivity • Geospatial hardware • GPS data collection tools • Software license and tracking 	D-2		
14. Request, coordinate, and deploy internal and external personnel through the Planning Section Chief. <ul style="list-style-type: none"> • Agency deployment system • Federal mission assignments/interagency agreements • Contracts 	D-2		
15. Order, inventory, and maintain equipment and supplies. <ul style="list-style-type: none"> • Inventory list of current supplies • Equipment and supplies received in working condition 	I		

Activity (Behavior): Provide geospatial coordination and customer service			
Competency: Customer Focus (C6); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
16. Determine and manage customer expectations for products. <ul style="list-style-type: none"> • Delivery time frames • Product requirements • Deliverables • Geospatial product request forms 	D-2		
17. Coordinate with appropriate stakeholders to prevent duplication of effort and to promote information sharing. <ul style="list-style-type: none"> • Regional Geospatial Coordinators • FEMA Headquarters Geospatial Coordinators • Air Operations Branch, if established • Federal, state, and local agencies • Private sector, as appropriate 	D-3		
18. Maintain close coordination with the Regional and National Remote Sensing Coordinators.	D-3		
19. Manage and synergize geospatial resources, including geographically-dispersed staff. <ul style="list-style-type: none"> • Co-located resources • Field sites • Emergency Operations Centers (EOCs) • Within sections branches/units • Emergency Support Functions (ESFs) 	I		

<p>20. Brief customers on geospatial capabilities and activities.</p> <ul style="list-style-type: none"> • Command and general staff • Geospatial support to decision-makers • Opportunities to apply and develop geospatial products across program areas • Interpretation of products 	D-2		
<p>21. Set geospatial priorities based on incident requirements.</p> <ul style="list-style-type: none"> • Situation Unit requirements • Incident Action Plan (IAP) • Unified Coordination Group (UCG) • State requirements • Information Collection Plan (ICP) 	D-2		

<p>Activity (Behavior): Manage completion and distribution of geospatial products</p> <p>Competency: Information Management (C13); Customer Focus (C6)</p>			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
<p>22. Review products for accuracy, timeliness, and completeness.</p> <ul style="list-style-type: none"> • Quality assurance • Quality control • Grammar and spelling • Cartographic representation • Disclaimer 	D-3		
<p>23. Manage workflow production, make necessary updates, and distribute geospatial products.</p> <ul style="list-style-type: none"> • Situation Unit requirements • Digital (Homeland Security Information Network [HSIN], Situational Awareness viewers, etc.) • Hard copies • Staff meetings • Work assignments • Conference calls 	D-2		
<p>24. Utilize models (if available) in coordination with authoritative sources.</p> <ul style="list-style-type: none"> • Simple language • Explanation of model biases or variations to decision-makers • Explanation of relevance to decision-makers 	D-2		
<p>25. Ensure products are developed within established time frames.</p> <ul style="list-style-type: none"> • Product request status • Product request completion 	D-3		

Activity (Behavior): Oversee management and analysis of geospatial data			
Competency: Manage & Organize Information (C18); Analysis/Reasoning (C2)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
26. Implement data management process and ensure staff adheres to procedures. <ul style="list-style-type: none"> • File directory structure • Metadata • Mission support areas • Dynamic event data 	D-2		
27. Maintain geospatial databases.	D-3		
28. Identify and share approved data sets with stakeholders. <ul style="list-style-type: none"> • Federal, state, and local organizations • Other FEMA program areas • Private sector • Public 	D-3		
29. Provide direction to staff on proper use and interpretation of geospatial data and decision support tools.	D-3		
30. Ensure plans and procedures are established for data backup in coordination with information technology (IT).	D-3		
31. Integrate event-specific data into regional/national data warehouse.	D-3		

Activity (Behavior): Comply with established policy and protocols			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
32. Supervise adherence to copyright, disclaimers, licensing, and other sensitive products and data distribution protocols. <ul style="list-style-type: none"> • Data license/end-user agreement (e.g., Homeland Security Infrastructure Program) • Commercial imagery license • Sensitive state and federal data (e.g., environmental data) • For Official Use Only (FOUO) • Personally Identifiable Information (PII) • Subject Matter Experts (SMEs) for authoritative data 	D-2		
33. Establish incident standard conventions for files, layouts, and templates.	D-2		

34. Ensure GIU-specific considerations are included in the Continuity of Operations Plan (COOP).	D-3		
35. Implement procedures as defined in current standards and doctrine.	D-3		
36. Maintain accurate information and reports on geospatial requests and production.	D-3		
37. Provide Documentation Unit with products for archiving. <ul style="list-style-type: none"> • Per FEMA Records Management policy 	D-3		

Activity (Behavior): Execute assigned tasks, assess progress, and make necessary adjustments			
Competency: Incident Action Planning (C11); Manage Resources (C19)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
38. Ensure that assigned tasks and expectations for the operational period are reasonable and accurate.	D-3		
39. Hold personnel accountable for execution of assigned tasks.	D-3		
40. Delegate specific authority based on the assigned tasks to subordinates.	D-3		
41. Make adjustments in response to new information, changing conditions, or unexpected obstacles.	D-3		
42. Request additional resources or release surplus resources.	D-3		
43. Address logistical problems that subordinates report.	D-3		
44. Make appropriate decisions and/or adjustments based on analyzed and validated information.	D-3		
45. Gather and analyze information to validate each subordinate's report of accomplishments.	D-3		
46. Ensure work completed is consistent with direction and policy. <ul style="list-style-type: none"> • Immediate supervisor's direction • Stafford Act requirements • FEMA policies 	D-3		
47. Keep assigned personnel informed of changes.	D-3		
48. Notify immediate supervisor of all resource status changes when they occur.	D-3		
49. Develop recommendations for next operational period.	D-3		

Activity (Behavior): Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
50. Demonstrate appropriate level of knowledge of ICS structure, principles, positions, and ICS forms.	I		
51. Maintain appropriate span of control.	I		
52. Use common terminology.	I		
53. Maintain unity of command.	I		

Activity (Behavior): Ensure all relevant information is exchanged during briefings and debriefings			
Competency: Decision Making & Judgment (C7); Communication-Verbal (C4)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
54. Attend scheduled briefings as required.	D-3		
55. Brief assigned subordinates. <ul style="list-style-type: none"> • Ensure that all direct subordinates receive a briefing • Ensure assignments are clear and provide additional information needed • Discuss special safety considerations or situations 	D-3		
56. Debrief your subordinates at the end of the operational period to gather information. <ul style="list-style-type: none"> • Current situation • Assessment of work progress • Adjustments needed • Additional resources needed • Reallocation of resources • Safety issues • What is going right—what is going wrong • Recommendations and limiting factors for the next operational period 	D-3		
57. Brief immediate supervisor and Situation Unit on results of debriefings.	D-3		

Activity (Behavior): Practice effective and appropriate interpersonal communication and team behavior			
Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
58. Demonstrate professional and appropriate verbal communication consistently. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Choose respectful words • Be clear and concise • Minimize use of acronyms 	I		
59. Demonstrate professional and appropriate non-verbal communication consistently. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
60. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> • Participating agencies • Emergency Support Functions (ESFs) • Counterparts at all levels 	I		
61. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
62. Share current information with co-workers and immediate supervisor.	D-3		
63. Be an effective team player. <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

Activity (Behavior): Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
64. Provide for the safety, welfare, and accountability of coworkers.	D-3		
65. Recognize potentially-hazardous situations.	D-3		
66. Communicate potentially-hazardous situations.	D-3		
67. Use personal protective equipment (PPE) as issued.	D-3		
68. Safeguard property and equipment.	D-3		
69. Provide current information for the call-down roster.	D-3		
70. Maintain the integrity of the call-down roster.	D-3		
71. Verify special precautions are taken when hazards exist.	D-3		
72. Develop and communicate emergency procedures consistent with the safety security plans.	D-3		

Activity (Behavior): Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
73. Maintain a high standard of ethics required of federal employees that is consistent with FEMA core values.	I		
74. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation, and other individual differences in accordance with the Under Secretary of Homeland Security's nondiscrimination policy.	I		
75. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Activity (Behavior): Demonstrate effective supervisory and leadership principles			
Competency: Ethics & Integrity (C9); Leadership (C16)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
76. Exhibit principles of duty, integrity, and respect. <ul style="list-style-type: none"> • Take charge and communicate expectations • Accept responsibility and be accountable • Make sound and timely decisions • Delegate authority and hold people accountable • Ensure that tasks are understood • Look out for the well-being of your subordinates • Be punctual • Ensure fair and equal treatment of all subordinates • Keep subordinates informed • Foster teamwork • Be honest (do the right thing when no one is looking) • Be consistent and reliable • Establish trust through open communication 	D-3		
77. Provide vision for unit members to accomplish their mission. <ul style="list-style-type: none"> • Put your unit’s assignments in the context of the bigger picture 	D-3		
78. Establish work assignments and set priorities.	D-3		
79. Take corrective action when problems arise.	D-3		
80. Establish and communicate basic work guidelines. <ul style="list-style-type: none"> • Work hours • Rotation schedule • Call-down contact list • Staggering of work hours 	D-3		
81. Keep subordinates informed of decisions, actions, and changes that affect them.	D-3		
82. Evaluate performance continuously.	D-3		
83. Communicate performance deficiencies immediately and take corrective action.	D-3		
84. Ensure that personnel receive needed training, mentoring, and coaching. <ul style="list-style-type: none"> • Conduct orientation sessions and arrange on-the-job training for new hires • Arrange for ongoing training and professional development for assigned personnel to develop required skills • Coach personnel so they can develop and maintain skills • Provide subordinates with opportunities for development 	D-3		

85. Recognize effective individual and team performance.	D-3		
86. Ensure all personnel time records are complete, accurate, and submitted within established time frames.	D-3		
87. Prepare performance appraisals and discuss the results with direct reports.	D-3		
88. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	D-3		
89. Assess the need for and monitor the use of overtime hours, avoiding unnecessary expenditures.	D-3		
90. Monitor employee performance to assess the need for possible rest or rotation.	D-3		

Activity (Behavior): Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
91. Determine the time of transfer.	I		
92. Provide for adequate overlap to ensure efficient transfer of duties.	I		
93. Ensure that incident status information is up-to-date.	I		
94. Ensure that an effective transfer of duties is accomplished. <ul style="list-style-type: none"> • Preferable: In-person briefing and written • Key positions made aware of key concerns 	I		
95. Brief replacement on current situation.	I		
96. Notify immediate supervisor when the transition is complete.	I		

Activity (Behavior): Properly check out of the incident Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
97. Obtain performance appraisal from supervisor.	I		
98. Make return travel arrangements.	I		
99. Prepare final travel voucher.	I		
100. Return accountable property.	I		
101. Submit final timesheet, appraisal form, and travel voucher.	I		
102. Check out with Automated Deployment Database (ADD).	I		
103. Report to the Training Unit upon completion of training assignment.	I		
104. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Geospatial Information Unit Leader (GIUL)

 TRAINEE NAME

 TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Geospatial Information Unit Leader (GIUL)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Geospatial Information Unit Leader (GIUL)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number

Official's Printed Name, Title, HQ/Region, and Phone Number



FEMA

FEMA INCIDENT MANAGEMENT POSITION TASK BOOK

Remote Sensing Specialist (RMSP)

POSITION TASK BOOK (PTB) ASSIGNED TO:

Individual's Name, HQ/Region

POSITION TASK BOOK (PTB) INITIATED BY:

Official's Name, Title, HQ/Region

Date PTB Initiated

FEMA has developed Position Task Books (PTBs) based on the National Incident Management System (NIMS), FEMA doctrine, and the FEMA Incident Management Handbook (IMH).

INTRODUCTION

Each PTB lists a general description of an observable behavior/activity followed by the competency and the associated performance requirements written as tasks for the specific position in a format that allows a trainee to be evaluated. Successful performance of all tasks, as observed and recorded by an evaluator, is required prior to a recommendation that the trainee be certified as qualified in the position. Evaluation and confirmation of the individual's performance of all tasks may involve more than one evaluator and can occur on incidents such as disasters, emergency declarations, special events, and exercises. Some tasks are required to be performed on a disaster. It is important that all tasks be critically evaluated and recorded by each evaluator.

ISSUING AUTHORITY

This PTB has been issued by the certifying official or a Training Unit Leader/Specialist on an incident with approval from the certifying official. Issuance by the certifying official indicates that the trainee is qualified in the required FQS position(s) for this PTB to be initiated. The issuance section of the PTB (i.e., the official's signature on the cover page) documents the initiating of the PTB and that the trainee meets the required prerequisites. It is the discretion of the certifying official as to whether or not to issue a PTB.

DEFINITIONS

- **Behavior/Activity:** A description of an observable behavior (work activity) that allows the grouping of similar tasks necessary to perform the specific behavior. Incident management, incident support, and program subject matter experts have developed behaviors for all incident management and incident support positions.
- **Competency:** An observable, measurable pattern of a knowledge, skill, ability, behavior and/or other characteristic that an individual needs to perform the behavior/activity and associated tasks. A competency specifies what skill set the person needs to possess to do the task(s) successfully. A competency forms the basis for position specific training, position task books, job aids, and other performance-based documents.
- **Task:** A specific description of a behavior/activity that is necessary for the successful performance in a position which must be demonstrated. Tasks within the PTB are numbered sequentially; however, the numbering does NOT indicate the order in which the tasks need to be performed or evaluated.
- **Indicators:** The bullets under each numbered task are examples or indicators of items or actions related to the task. The purpose of the bullets is to assist the evaluator in evaluating the trainee. The evaluator should also refer to the Evaluator's Guide that lists further behavioral examples which will assist in assessing the trainee's performance. The bullets are not all-inclusive. Evaluate and initial ONLY the tasks. DO NOT evaluate and initial each individual bullet.

CODES

Codes have been developed to identify the required environment in which a specific task must be successfully demonstrated. The code represents the lowest in the hierarchy at which the task can be signed off as successfully completed. These codes are arranged in the following hierarchy:

Hierarchy	Code	Definition
Highest 	D - 1	Declared Disaster (Stafford Act incident which includes Major Disaster and Emergency Declarations).
	D - 2	
	D - 3	
	I	A Non-Stafford Act Incident (i.e., Federal to Federal Support; FEMA is not the lead Federal agency). This includes pre-declaration surge activities.
Lowest	E	An event, such as a National Special Security Event (NSSE) OR an organized, pre-planned exercise or simulation approved by the Certifying Official or higher authority.

A task may be signed off at the specified level or at any higher level.

Disasters are classified as Level I, II, or III with Level I representing the largest and most complex. In this PTB these levels are associated with the “D” in the code column. Each task has one of the above codes listed in the Code column associated with the task.

EVALUATION

The Evaluator’s Guide provides performance indicators for the evaluator’s use when assessing the trainee’s performance and determining if an employee has satisfactorily performed each of the tasks listed in a PTB. The competency listed in the PTB under each behavior/activity contains a reference number that links to the Evaluator’s Guide. For example, listed below is a sample behavior/activity and competency listed in a PTB:

Behavior/Activity: **Ensure readiness for assignment prior to deployment**
Competency: **Dependability (C8)**

The Evaluator’s Guide lists the competencies in numerical order which correspond to the number referenced in the PTB. For example, when looking at the Evaluator’s Guide for performance indicators concerning Dependability, the Evaluator will see the following:

C8. Dependability

Definition: Takes personal responsibility for work; looks at an individual's ability to be seen as reliable, steady, responsible and committed in relation to everything they do for themselves and others; can be relied upon to be punctual and to follow through with assignments.

- Conscientious, thorough, accurate, and reliable when performing and completing job tasks;
- Shows commitment/dedication and accountability in one's work, and follows through on all projects, goals, aspects of the work;
- Completes assigned tasks on time and with minimal supervision;
- Arrives prepared for work;
- Fulfills all commitments made to peers, co-workers, and supervisor;
- Completes work in a timely, consistent manner; works hours necessary to complete assigned work; is personally responsible.
- Keeps commitments - committed to doing the best job possible.

RESPONSIBILITIES**1. Certifying Official** is responsible for:

- Identifying trainees based on agency requirements and strategic goals.
- Issuing the Position Task Book and ensuring that the trainee meets all required prerequisites.
- Providing opportunities for evaluation and/or making trainees available for evaluation.
- Explaining to the trainee the purpose and process of the PTB as well as the trainee's responsibilities.
- Tracking progress of the trainee.
- Confirming PTB completion.
- Certifying the trainee for those positions falling within their certification authority (all non-typed positions below the Unit Leader in the Logistics, Planning, and Finance/Administration Sections; and all positions below the Division/Group Supervisor and Task Force Leader within the Operations Section).
- Recommending certification of the trainee for those positions not falling within their certification authority.

2. The Trainee is responsible for:

- Reviewing instructions in the PTB.
- Providing the evaluator with background information pertinent to the position.
- Satisfactorily completing all tasks within 3 years from the date of the first task being evaluated.
- Provide a copy of the completed PTB to the certifying official for review and initiation of the certification process.
- Retaining the original PTB in personal record.

3. The Evaluator is responsible for:

- Being qualified in the position being evaluated.

- Meeting with the trainee and determining past experience, current qualifications, and desired objectives and goals.
 - Reviewing tasks with the trainee.
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
 - Accurately evaluating and recording demonstrated performance of tasks. Initialing and dating completion of the tasks shall document satisfactory performance.
 - Documenting unsatisfactory performance in the Evaluation Record.
 - Completing the Evaluation Record.
4. **The Final Evaluator** is the evaluator of the trainee when the final tasks in the PTB are completed. If only one evaluator signs off on all of the tasks in the PTB, then that individual is also the final evaluator. This individual will ensure that all tasks have been initialed and is responsible for:
- Signing the Final Evaluator's Verification Statement when all tasks have been initialed by an evaluator.
5. **Incident Training Unit Leader (when assigned)** is responsible for:
- Issuing a PTB to the trainee that does not have one after contacting the Certifying Official for approval of the selection and confirmation that the trainee meets all required prerequisites.
 - If the PTB is issued at the incident site, then the Incident Training Unit Leader is further responsible for:
 - Identifying and assigning an evaluator who can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance;
 - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities;
 - Confirm participants' understanding of their roles/responsibilities in FQS process;
 - Tracking progress of the trainee and conducting progress reviews as appropriate;
 - Identifying incident evaluation opportunities;
 - Conduct final incident FQS trainee interview;
 - Submit final FQS training unit package at close-out and forward to the HQ Response Training Unit.
6. **A Certifying Authority** is the FEMA official who has direct reporting responsibility to the FEMA Administrator and has authority to certify FEMA personnel as qualified in identified positions. He/she is responsible for:
- Certifying on the PTB that the trainee has completed all requirements for the position.
 - After certification, return the PTB to the individual for their personal records.

TASKS TO PERFORM

Behavior/Activity: Ensure readiness for assignment prior to deployment			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
1. Obtain and assemble materials needed for assignment. <ul style="list-style-type: none"> • Current program guidance • FEMA Incident Management Handbook (IMH) • Position Task Book (PTB) if applicable • FEMA Acronyms, Abbreviations and Terms (FAAT) book • Position job aids if available 	E		
2. Obtain information prior to deployment. <ul style="list-style-type: none"> • Incident type, name, and number • Travel authorization number • Specific job assignment • Name and phone of supervisor if available • Reporting time and location • Transportation arrangements • Contact procedures during travel • Expected duration of assignment • Expected working conditions 	I		
3. Review and conform to Chapter 2, IMH, “Common Responsibilities.”	I		
4. Ensure that agency identification (badge) is current or have two forms of federally recognized picture identification. <ul style="list-style-type: none"> • Driver’s license • Passport • Federal/state agency identification 	I		

Behavior/Activity: Follow proper check-in procedures upon arrival and obtain job-required equipment and supplies			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
5. Check in at designated incident check-in location and complete check-in packet.	I		
6. Obtain agency identification (badge) or other government-issued identifications.	I		

7. Obtain additional job-required equipment or supplies. <ul style="list-style-type: none"> • Computer • Cellular or desk phone • Handheld GPS, if applicable • Camera, if applicable • Office supplies • Maps • Air Card, if applicable 	I		
8. Report to the Training Unit to check in as a trainee.	I		
9. Check in with the Automated Deployment Database (ADD).	I		

Behavior/Activity: Obtain an initial briefing from immediate supervisor and gather information relevant to your assignment			
Competency: Researching Information (C21)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
10. Obtain situational information relevant to your assignment.	I		
11. Obtain initial direction from your immediate supervisor concerning your assignment.	I		
12. Identify topics, issues, and concerns of potential relevance to your assignment.	I		

Behavior/Activity: Request, prioritize, and generate remote sensing products			
Competency: Analysis/Reasoning (C2); Incident Action Planning (C11)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
13. Identify local, state, and federal remote sensing assets and capabilities.	I		
14. Identify requirements and Essential Elements of Information (EEI) in coordination with appropriate authorities. <ul style="list-style-type: none"> • Information Collection Plan (ICP) 	I		
15. Prioritize Areas of Interest (AOI) in coordination with appropriate authorities. <ul style="list-style-type: none"> • State requests • Operations Section Chief 	I		

16. Submit requirements to FEMA National or Regional Remote Sensing Coordinators. <ul style="list-style-type: none"> Action Request Form (ARF) Verbal or written requests 	I		
17. Manage expectations of product deliverables and timelines. <ul style="list-style-type: none"> Flight/acquisition schedules Imagery resolution Data processing, exploitation, and dissemination 	I		
18. Use standard conventions for files, layouts, and templates as established for the incident.	I		
19. Operate specialized software applications to produce remote sensing products.	I		
20. Operate and maintain desktop and wide-format printers.	I		

Behavior/Activity: Manage remote sensing data			
Competency: Information Management (C13); Manage & Organize Information (C18)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
21. Access, retrieve, and catalogue remote sensing data. <ul style="list-style-type: none"> Common raster file formats Web map service Web coverage service 	I		
22. Create and maintain remote sensing databases. <ul style="list-style-type: none"> Data storage and scalability Post-collection processing Mosaic data set Image services 	I		
23. Review data for geospatial accuracy to meet operational requirements.	I		
24. Import/export geospatial data. <ul style="list-style-type: none"> Various coordinate systems Data Projections 	I		

Behavior/Activity: Analyze and interpret data			
Competency: Analysis/Reasoning (C2); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
25. Follow established standards for data interpretation. <ul style="list-style-type: none"> • Hazard-specific policies and standards • FEMA policy 	I		
26. Demonstrate skills in interpreting and generating imagery-derived vector products.	I		
27. Analyze and compare imagery with operational information.	I		
28. Request and coordinate external analysis and support, as needed. <ul style="list-style-type: none"> • Federal, state, and local organizations • Private sector • Academia 	I		

Behavior/Activity: Comply with established policy and protocols			
Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
29. Adhere to copyright, disclaimers, licensing, and other sensitive products and data distribution protocols. <ul style="list-style-type: none"> • Per supervisor direction • Data license/end-user agreement (e.g., Homeland Security Infrastructure Program) • Commercial imagery license • Sensitive state and federal data (e.g., environmental data) • For Official Use Only (FOUO) • Personally Identifiable Information (PII) • Subject Matter Experts (SME) for Authoritative data 	I		
30. Follow procedures as defined in current standards and doctrine.	I		

Behavior/Activity: Provide remote sensing coordination and customer service			
Competency: Customer Focus (C6); Decision Making & Judgment (C7)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
31. Brief customers on interpretation and use of products.	I		
32. Assist customers with preparing product request forms.	I		
33. Track requests for completion.	I		
34. Distribute geospatial products. <ul style="list-style-type: none"> Digital (e.g., Homeland Security Information Network [HSIN], Situational Awareness [SA] viewers, etc.) Hard copies 	I		
35. Identify potential needs for remote sensing support across functional areas. <ul style="list-style-type: none"> Emergency Services External Affairs Hazard Mitigation Individual Assistance Logistics Long-Term Recovery & Planning Planning Public Assistance/Infrastructure 	I		
36. Coordinate with appropriate stakeholders to prevent duplication of effort and to promote information sharing. <ul style="list-style-type: none"> Regional Remote Sensing Coordinators FEMA Headquarters Remote Sensing Coordinator Air Operations Branch, if established Federal, state, and local agencies Private sector, as appropriate 	I		

Behavior/Activity: Understand, use, and comply with ICS concepts, principles, and processes			
Competency: Incident Command System Concepts (C12)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
37. Demonstrate appropriate level of knowledge of ICS structure, principles, and positions.	I		
38. Use common terminology.	I		

Behavior/Activity: Practice effective and appropriate interpersonal communication and team behavior Competency: Communication-Verbal (C4); Interpersonal Skills (C14)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
39. Demonstrate professional and appropriate verbal communication consistently. <ul style="list-style-type: none"> • Use common terminology • Avoid slang or other confusing terminology • Choose respectful words • Be clear and concise • Minimize use of acronyms 	I		
40. Demonstrate professional and appropriate non-verbal communication consistently. <ul style="list-style-type: none"> • Practice active listening • Eye contact • Appropriate body language 	I		
41. Ask clarifying questions to ensure accurate understanding of directions. <ul style="list-style-type: none"> • Specificity of clarifying questions • Briefly repeat understanding of directions 	I		
42. Share current information with co-workers and immediate supervisor.	D-3		
43. Be an effective team player. <ul style="list-style-type: none"> • Be open to other points of view • Generate alternative solutions or strategies to address problems/issues • Support team members by being helpful and encouraging • Know and do your part • Support the mission • Create open communication channels • Identify common interests 	D-3		

Behavior/Activity: Follow established safety and security procedures			
Competency: Adhere to Security Procedures (C1); Implement Workplace Safety (C10)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
44. Provide for the safety, welfare, and accountability of coworkers.	D-3		
45. Recognize potentially-hazardous situations.	D-3		
46. Communicate potentially-hazardous situations.	D-3		
47. Use personal protective equipment (PPE) as issued.	D-3		
48. Safeguard property and equipment.	D-3		
49. Provide current information for the call-down roster.	D-3		

Behavior/Activity: Establish and maintain positive and ethical behaviors			
Competency: Ethics & Integrity (C9)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
50. Maintain a high standard of ethics required of Federal employees that is consistent with FEMA core values.	I		
51. Demonstrate sensitivity to cultural diversity, race, gender, disabilities, sexual orientation, and other individual differences in accordance with the Under Secretary of Homeland Security's nondiscrimination policy.	I		
52. Exhibit appropriate public stewardship of taxpayer dollars.	I		

Behavior/Activity: Ensure continuity of operations during the transition of duties to a replacement			
Competency: Planning & Organizing (C20)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
53. Determine the time of transfer.	I		
54. Provide for adequate overlap to ensure efficient transfer of duties.	I		
55. Ensure that incident status information is up-to-date.	I		
56. Ensure that an effective transfer of duties is accomplished.	I		

Behavior/Activity: Properly check out of the incident Competency: Dependability (C8)			
TASK	CODE	RECORD NUMBER	EVALUATOR INITIALS
57. Obtain performance appraisal from supervisor.	I		
58. Make return travel arrangements.	I		
59. Prepare final travel voucher.	I		
60. Return equipment to Accountable Property Officer (APO).	I		
61. Submit final timesheet, appraisal form, and travel voucher.	I		
62. Check out with Automated Deployment Database (ADD).	I		
63. Report to the Training Unit upon completion of training assignment.	I		
64. Check out with the IT Service Manager in the Communication Unit.	I		

INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

- There are four separate Evaluation Records available for use, if necessary, each of which correspond to an assignment, either a disaster, a non-disaster incident, or an exercise (see forms that follow).
- It is not necessary for a trainee to complete four assignments; however, four should normally be sufficient for an individual to qualify in a position, but if additional assignments are needed, an Evaluation Record can be copied and attached to the PTB.

Complete These Items at the Start of the Evaluation Period:

- ***Evaluator's Name:*** Evaluator enters name here (Print).
- ***Incident/disaster/exercise position title:*** Enter the evaluator's incident/disaster/exercise position title.
- ***Evaluator's office address and phone:*** Self-explanatory.
- ***Record Number:*** The Record Number listed in the upper left corner of the Evaluation Record identifies the evaluator of a particular incident. This number should be placed in the column labeled "Record #" in the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to tie the tasks to the evaluator at a specific incident.
- ***Incident/Disaster/Exercise (Name, Number, Location):*** Identify the incident/disaster/exercise by name, number, and location.
- ***Disaster Complexity Level:*** Enter the Disaster Complexity Level (I, II, or III).

Complete These Items at the End of the Evaluation Period:

- ***Duration:*** Enter inclusive dates during which the trainee was evaluated.
- ***Recommendation:*** Check as appropriate and make comments regarding the future needs for development of this trainee as appropriate.
- ***Date:*** List the date the record is being completed.
- ***Evaluator's initials:*** Initial here to authenticate your recommendations and to allow for comparison with initials in the PTB.
- ***Evaluator's Qualification:*** List your qualification that validates your authority to evaluate and approve successful performance of tasks by the trainee.

Evaluation Record

Remote Sensing Specialist (RMSP)

TRAINEE NAME

TRAINEE POSITION

Record #1	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #2	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Evaluation Record

Remote Sensing Specialist (RMSP)

TRAINEE NAME

TRAINEE POSITION

Record #3	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

Record #4	Evaluator's name (Print):	
	Incident/disaster/exercise position title:	
Evaluator's office address & phone:		
<u>Disaster/Incident/Event-Exercise (Name, Number, Location)</u>	<u>Disaster Level</u>	<u>Duration</u>
		to
<p>The tasks initialed & dated by me have been performed under my supervision in a satisfactory manner by the above-named trainee. I recommend the following for further development of this trainee.</p> <p>_____ The individual has successfully performed all tasks for the position and should be considered for certification.</p> <p>_____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation.</p> <p>_____ The individual is deficient in the performance of tasks identified below and needs further training prior to additional assignment(s) as a trainee.</p> <p>Deficiencies noted (List Competency and Task #):</p> <p>Date: _____ Evaluator's initials: _____</p> <p>Evaluator's qualification: _____</p>		

FINAL EVALUATOR & CERTIFYING OFFICIAL

Do NOT complete this unless you are recommending the trainee for certification

Verification/Certification of Completed Position Task Book for the Position of

Remote Sensing Specialist (RMSP)

Final Evaluator's Verification

I verify that _____ has successfully performed all required tasks as a trainee which are documented with appropriate initials in this PTB and should therefore be considered for certification in this position.

Final Evaluator's Signature and Date

Final Evaluator's Printed Name, Title, HQ/Region, and Phone Number

Agency Certification

I certify that _____ has met all requirements for qualification in this position.

Official's Signature and Date

Official's Printed Name, Title, HQ/Region, and Phone Number