



FEMA

NATIONAL QUALIFICATION SYSTEM (NQS)

**POSITION TASK BOOK
FOR THE POSITION OF**

DONATIONS COORDINATION TASK FORCE LEADER

Version: September 2017

Check the appropriate position type:

Single Type

Type 1

Type 2

Type 3

POSITION TASK BOOK ASSIGNED TO:
TRAINEE'S NAME:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:
POSITION TASK BOOK WAS INITIATED:
LOCATION:
DATE:

Evaluator Verification

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

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

Documentation of Agency Certification

DOCUMENTATION OF AGENCY CERTIFICATION
I certify that _____ has successfully met all of the criteria set out in the National Incident Management System (NIMS) Job Title/Position Qualifications document for the position and will hereby receive certification of his/her qualification.
OFFICIAL'S SIGNATURE:
DATE:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
E-MAIL:

Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a trainee must meet to be certified for a position within the National Qualification System (NQS). The performance criteria are associated with core NQS competencies, behaviors, and tasks.

A trainee may not work on multiple position type PTBs for a specific position at the same time; for example, a trainee may not simultaneously work on a Type 1 Incident Commander PTB and a Type 2 Incident Commander PTB. If a position has multiple types, the trainee must, in most cases, qualify at the lowest type before pursuing the next higher type. For example, before seeking qualification for a Type 1 position, an individual must first qualify at the Type 3 level and then at the Type 2 level.

Evaluation Process

- Evaluators observe and review a trainee's completion of PTB tasks, initialing and dating each successfully completed task in the PTB.
- Evaluators complete an Evaluation Record Form after each evaluation period by documenting the trainee's performance.
- The Authority Having Jurisdiction (AHJ) may not have enough resources to ensure that every evaluator is qualified in the position being assessed. Therefore, a trainee's supervisor may evaluate the completion of PTB tasks. For example, a Logistics Section Chief has the authority to sign off on completed PTB tasks for a Food Unit Leader trainee.
- The final evaluator is a leader who verifies that a trainee has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the trainee is applying. When possible, the evaluator and the final evaluator should not be the same person, but in situations with limited resources, the evaluator can also serve as the final evaluator.
- Once the final evaluator has completed the Final Evaluator Verification, he/she forwards it to the Quality Review Board (QRB) along with supporting evidence that the trainee has completed all position requirements.
- After the QRB review, the AHJ completes the Documentation of Agency Certification form as appropriate.

Transferring Qualifications

- Personnel who have documentation of previous education, training, or significant on-the-job incident experience may receive credit toward qualification for a given position. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a trainee's existing certification of qualification, the trainee may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple certifications of qualification (that is, the Final Evaluator Verification form and the Documentation of Agency Certification form) along with the completed PTB.

Position Task Book Competencies, Behaviors, and Tasks

The PTB sets minimum criteria for certification for a position. The AHJ has the authority to add content to the baseline PTB competencies, behaviors, and tasks as necessary.

The PTB covers all type levels for a given position, but a trainee may check only one “Type” box and work on only one type at a time. (The National Incident Management System (NIMS) Job Title/Position Qualifications document describes all types.)

Command and General Staff job titles/positions qualifications are typed based on incident complexity, while all other NIMS positions are typed based on the minimum qualifications.

Definitions

Competency: An observable, measurable pattern of knowledge, skills, abilities, and other characteristics an individual needs to perform an activity and its associated tasks. A competency specifies the skillset a person needs to possess to complete the tasks successfully.

Behavior: An observable work activity or a group of similar tasks necessary to perform the activity.

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

- Occasionally, PTB tasks are unique to one of the types; for example, certain tasks apply only to a Type 3 Incident Commander, not to a Type 2 or Type 1 Incident Commander. In those cases, the PTB indicates the corresponding type at the beginning of the task.
- All tasks require evaluation; however, bullet statements within a task are examples.

PTB Task Codes

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

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

Code E: Task performed during a full-scale exercise with equipment deployed under the Incident Command System (ICS).

Code F: Task performed during a functional exercise managed under the ICS.

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

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

Code T: Task performed during a tabletop exercise.

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

How to Complete the Evaluation Record Form

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

Complete these items AT THE START of the evaluation period:

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

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

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

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

Incident kind: Enter the kind of incident (such as hazmat, law enforcement, wildland fire, structural fire, search and rescue, flood, or tornado).

Complete these items AT THE END of the evaluation period:

Number and kind of resources: Enter the number of resources assigned to the incident, and their kind (such as team, personnel, and equipment) pertinent to the trainee’s PTB.

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

Position type: Enter position type (such as Type 3, Type 2, Type 1, or Single Type).

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

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

Date: List the current date.

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

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

Evaluation Record Form

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

Donations Coordination Task Force Leader

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Donations Coordination Task Force Leader and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Understand and comply with NIMS concepts and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Understand scope, roles, responsibilities, jurisdiction, and authority of responding agencies: <ul style="list-style-type: none"> • Emergency Support Function (ESF) supporting agencies • Volunteer Task Force and Donations Coordination Task Force • Voluntary Organizations Active in Disaster (VOAD), national and state levels • Community Organizations Active in Disaster (COAD), local level 	E, F, I		
2. Demonstrate knowledge of donations management structure, principles, and positions: <ul style="list-style-type: none"> • Donations flow structure • Donations receipt, inventory, and distribution forms • Donations recipient case management forms 	E, F, I		

1b. Behavior: Successfully assume the role of Donations Coordination Task Force Leader and initiate position activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Initiate and maintain team activity log: <ul style="list-style-type: none"> • Complete activity log and use to support a common operating picture • Transfer information to additional documents, positions, and displays 	E, F, I		

1c. Behavior: Gather, update, and apply situational information relevant to the assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>4. Collect information from outgoing Donations Coordination Task Force Leader or other personnel responsible for the team:</p> <ul style="list-style-type: none"> • Information on incident relevant to team support activities • Information on the organizational structure • Information on the donations management organizational structure • Information on other donations operations in the incident area, such as Nongovernmental Organizations (NGO) 	E, F, I		

1d. Behavior: Ensure availability, qualifications, and capabilities of resources to complete assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>5. Identify kind, type, and quantity of resources necessary to achieve objectives:</p> <ul style="list-style-type: none"> • Consider span of control when determining resource requirements and configurations • Consider facility requirements for collection, warehousing, and distribution operations • Consider human resources needs for leadership positions at operational areas (collection, warehousing, and distribution centers) • Consider the use of spontaneous unaffiliated volunteers 	E, F, I		
<p>6. Order necessary resources to achieve team objectives:</p> <ul style="list-style-type: none"> • Request additional personnel, supplies, services, and equipment within the established ordering processes 	E, F, I		
<p>7. Identify the skill sets of all leadership positions for collection centers, warehouses, distribution centers, and call centers:</p> <ul style="list-style-type: none"> • Manager • Assistant Manager • Liaison Officer • Public Information Officer (PIO) • Facilities Manager • Safety and Security Officer • Volunteer Coordinator • Office Manager • Floor Manager • Receiving Manager • Sorting Manager • Processing Manager • Shipping Manager 	E, F, I, J, T		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>8. Identify specifications and secure appropriate locations for operational facilities:</p> <ul style="list-style-type: none"> • Warehouses, collection centers, distribution centers, mobile distribution, points of distribution, and call centers: <ul style="list-style-type: none"> ○ Location ○ Size and capacity ○ Donated or cost ○ Layout ○ Operational staff needs 	E, F, I, J, T		

1e. Behavior: Establish effective relationships with relevant personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>9. Establish and maintain positive interpersonal and interagency working relationships:</p> <ul style="list-style-type: none"> • Outgoing incident staff or teams • Local agencies • Hosting unit • Policy group • Public • Supporting agencies • State VOAD or equivalent • Local faith-based and community-based organizations • Call center staff • Warehouse staff • Collection and distribution staff 	E, F, I		

1f. Behavior: Establish or determine organizational structure, reporting procedures, and chain of command of assigned resources

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>10. Activate team:</p> <ul style="list-style-type: none"> • Establish appropriate team organization and assign staff responsibilities, while maintaining span of control • Ensure availability of appropriate resources, including equipment, trucks, and consumables (such as boxes, tape, and shrink wrap) for collection, warehouse, and distribution operations • Conduct supporting activities within operational period • Follow protocol for communicating team's daily accomplishments to the Documentation Unit or appropriate personnel • Obtain operational rhythm from supervisor and establish daily briefing/debriefing schedule with assigned personnel • Follow process for resource requests/releases for operational planning purposes • Assign staff as appropriate • Participate in planning meetings to determine team organization, support tactical assignments, ensure resource support and coordination needs, and identify other considerations for the next operational period 	E, F, I		
<p>11. Supervise and adjust team organization and operations based on changes in incident situation and resource status:</p> <ul style="list-style-type: none"> • Maintain common operating picture throughout the team • Provide for functional and geographical supervision as necessary • Ensure effective use and coordination of all assigned resources • Constantly monitor objectives and overall team operations for efficacy and safety 	E, F, I		

2. Competency: Lead assigned personnel

Description: Influence, lead, and direct assigned personnel to accomplish objectives and desired outcomes in a potentially rapidly changing environment.

2a. Behavior: Coordinate interdependent activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Ensure effective use and coordination of all assigned resources: <ul style="list-style-type: none"> • Conduct briefing and debriefing with assigned personnel and supervisor between operational periods 	E, F, I		
13. Coordinate with assigned personnel and give supervisor a list of excess resources: <ul style="list-style-type: none"> • List may include: <ul style="list-style-type: none"> ○ Kind and type ○ Quantity ○ Time/date of available release • Review the list daily for accuracy, ensuring all staff demobilize in a timely and complete manner 	E, F, I		
14. Coordinate with local entities: <ul style="list-style-type: none"> • Emergency management • VOAD • COAD • Faith-based and community-based groups • Chambers of commerce, business executives, and private sector 	E, F, I		
15. Coordinate the disposition of unusable donated items: <ul style="list-style-type: none"> • Trash service • Recycling company • Organizational partners having operations that may use donated goods 	E, F, I, T		
16. Integrate all identified Donations Management and volunteer management partners into operations based on their capabilities and capacities: <ul style="list-style-type: none"> • VOAD organizations with local chapters/entities • Unaffiliated local organizations/agencies 	E, F, I, J, T		
17. Review and execute any local Memorandums of Understanding (MOU), standing agreements, and contracts, as directed by the Authority Having Jurisdiction (AHJ).	E, F, I, J, T		
18. Comply with AHJ accounting, budget, and cost control procedures.	E, F, I, J, T		

3. Competency: Communicate effectively

Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a potentially rapidly changing environment.

3a. Behavior: Ensure the exchange of relevant information during briefings and debriefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
19. Lead Donations Coordination Task Force meetings: <ul style="list-style-type: none"> • Present: <ul style="list-style-type: none"> ○ Changes to the Donations Management Plan ○ Team-specific information and instructions • Outline Donations Coordination Task Force goals and objectives 	E, F, I, J		
20. Ensure the efficient sharing of all relevant information among staff and all branches of donations operation: <ul style="list-style-type: none"> • Donations still needed and not needed • Inbound donations • Volunteer needs • Inventory • Warehouse status • Collection center status • Distribution network status • Call center status 	E, F, I		

3b. Behavior: Ensure documentation is complete and disposition is appropriate

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
21. Ensure incident documentation and administrative requirements are complete, according to the supervisor's direction: <ul style="list-style-type: none"> • Submit incident narrative to supervisor • Complete and submit activity log to Documentation Unit or appropriate personnel for each operational period • Ensure all personnel and equipment time records are complete and submitted at the end of each operational period 	E, F, I		
22. Ensure the protection of Personally Identifiable Information (PII).	E, F, I		
23. Ensure accurately tracked and reported documentation of volunteer hours.	E, F, I		
24. Coordinate with AHJ to create a vetted list of approved agencies or organizations for a distribution network.	E, F, I		
25. Use appropriate software to report, receive, inventory, and track donations.	E, F, I		
26. Develop an inventory of warehoused donated goods with disposition to appropriate agencies and authorities.	E, F, I		

3c. Behavior: Communicate incident priorities and operations

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
27. Monitor and report flow of inbound donations.	E, F, I		
28. Update supervisor on current accomplishments or problems and complete incident forms as necessary.	E, F, I		
29. Coordinate with PIO/External Affairs and call centers to ensure appropriate and timely communication of donation needs and responsible donating practices: <ul style="list-style-type: none"> • Reference FEMA L-217, When Disaster Strikes... How to Donate or Volunteer Successfully! 	E, F, I		

3d. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
30. Participate in preparation of Donations Management Plan, planning meeting, or strategic plan for the next operational period: <ul style="list-style-type: none"> • Update team on current situation • Help set priorities for next operational period • Determine tasks and work assignments for next operational period(s) • Advise on current capabilities and limitations • Determine resource needs or excess 	E, F, I		
31. Implement or assist in the development of existing plans or policies that address: <ul style="list-style-type: none"> • Monetary donations • Unsolicited donations • Corporate donations • International donations • Donated services • In-kind donations 	E, F, I		
32. Develop a scalable strategy for donations operations: <ul style="list-style-type: none"> • Open/close collection, distribution, and call centers • Increase/decrease warehouse space and staffing 	E, F, I		

4. Competency: Ensure completion of assigned actions to meet identified objectives

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established time frame.

4a. Behavior: Execute assigned tasks, assess progress, and make necessary adjustments

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
33. Ensure that assigned tasks and expectations for the operational period are reasonable and accurate.	E, F, I		
34. Make appropriate decisions based on analyzed and validated information: <ul style="list-style-type: none"> • Make adjustments in response to new information, changing conditions, or unexpected obstacles 	E, F, I		
35. Ensure that the work completed is consistent with direction, policy, and incident objectives: <ul style="list-style-type: none"> • Supervisor's direction • Incident Action Plan (IAP) goals and objectives • State Volunteer Task Force and Donations Coordination Task Force • Donations Management Plan • Other planning goals and objectives 	E, F, I		

4b. Behavior: Oversee and support the actions of Donated Goods Warehouse Management Team or Donations Coordination Task Force

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
36. Identify appropriate locations for call, collection, and distribution centers.	E, F, I		
37. Secure appropriate multiagency warehouse location(s) with appropriate capacity.	E, F, I		
38. Secure infrastructure needs for multiagency warehouse, collection, distribution, and call center operations.	E, F, I		
39. Follow all AHJ purchasing, accounting, and cost control procedures.	E, F, I		
40. Secure appropriate staffing for all operational structures: <ul style="list-style-type: none"> Collection, warehouse, distribution 	E, F, I		
41. Secure volunteer support for all operations.	E, F, I		
42. Review all standing local MOU, agreements, and contracts.	E, F, I		
43. Coordinate the inflow of donations under the authority of the AHJ: <ul style="list-style-type: none"> Unsolicited Solicited Cash Services In-kind 	E, F, I		
44. Activate operations as necessary: <ul style="list-style-type: none"> Collection centers/sites Warehouses Distribution centers Mobile distribution services Points of distribution Call centers 	E, F, I		

4c. Behavior: Transfer position duties while ensuring continuity of authority and knowledge and while taking into account the increasing or decreasing incident complexity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
45. Coordinate an efficient process to mobilize and demobilize collection and distribution sites, multiagency warehouses, and call centers: <ul style="list-style-type: none"> Identify local agency resources to continue donations services, including long-term recovery committees Established network for multiagency warehouse transfer, if necessary 	C, E, F, I, J, T		

4d. Behavior: Plan for deactivation/demobilization and ensure staff follow procedures

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
46. Help develop, approve, and implement demobilization plan: <ul style="list-style-type: none"> • Coordinate with supervisor during development and implementation • Coordinate with appropriate partners regarding demobilization procedures • Coordinate team needs and responsibilities • Provide information to supervisor to assist with decisions on release priorities 	E, F, I		
47. Coordinate the efficient transfer of warehouse, collection, distribution, and call center operations to the local AHJ.	C, E, F, I, J, T		
48. Complete process for deactivating/demobilizing team responsibilities: <ul style="list-style-type: none"> • Reinforce emphasis on safety and accountability during this phase of the operations • Brief team on deactivation/demobilization responsibilities • Ensure all staff demobilize in a timely and complete manner • Brief replacement, if applicable 	E, F, I		
49. Participate in organization closeout/After Action Review (AAR).	E, F, I		