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Incident Business Advisor Guide

INCIDENT BUSINESS PRACTICES

INCIDENT BUSINESS ADVISOR GUIDE

This guide is designed to be used prior to, during, and after an incident by an Agency Administrator (AA), Area Commander (ACDR), Incident Business Advisor (IBA), and Incident Unit personnel to facilitate a successful IBA assignment. It can be supplemented by other publications and references.

Purpose of the Incident Business Advisor

During the past several years some agency administrators have requested a Comptroller to assist in the coordination of Incident Business Management Practices. The use of a Comptroller has been both successful and unsuccessful. Lack of success occurred most often when the focus of the position was cost containment and control. The Comptroller position realistically cannot control costs under this premise. For the position to be consistently successful, the focus must change.

The Incident Business Advisor (IBA) replaces the Comptroller with the focus being a liaison and advisor to the Agency Administrator (AA), working directly for the AA. The IBA is recognized as an interagency position. The IBA serves as a “bridge” to the AA, Incident Management Team and other incident support functions. This “bridge” provides a communication flow to assigned resources with the focus being successful incident business management practices.

Incident business management practices on a unit are a critical element of incident operations. IBA utilization will facilitate the unit’s ability to implement sound incident business practices, such as cost effectiveness and adequate financial documentation. AA’s should determine if they have qualified resources available to fulfill the IBA position. Guidelines for determining the need for an IBA have been established.

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Sponsored for NWCG publication by the NWCG Incident Business Practices Working Team. Prepared by the Interagency Incident Business Advisor Committee.

Comments regarding content of this publication should be directed to: National Interagency Fire Center, USDA Forest Service, ATTN: Tory Majors, 3833 S. Development Avenue, Boise, ID 83705.

Email: tmajors/wo_nifc@fs.fed.us

Copies of this publication may be requested from the address above or downloaded from www.nwcg.gov/pms.htm

**AGENCY ADMINISTRATOR GUIDELINES FOR
INCIDENT BUSINESS ADVISOR ACTIVATION**

<i>AGENCY ADMINISTRATOR GUIDELINES</i>		Actions/Assignment/Remarks
A-I	<p>Identify the need for and the role(s) of an Incident Business Advisor (IBA) to meet incident support needs. The Agency Administrator (AA) through discussions with the Fire Program Manager and Head of Administration, determines the IBA level needed.</p> <p>Criteria to use to determine if you may need to order an IBA include: if a Type I or II Incident Management Team have been ordered, Area Command has been established, or the anticipation of complex incident business management (i.e., numerous types of aircraft, cost share agreements, military equipment, buying team, payment teams, anticipation of long term administrative impact to the unit, politically sensitive incident issues).</p>	
A-II	<p>The AA may choose to go off unit if there are no qualified personnel on the unit, qualified personnel are not available, the incident business complexity exceeds qualification level of unit personnel, etc.</p>	
A-III	<p>The qualification level of the IBA ordered is dependent on the complexity of the incident(s). There are IBA responsibilities to fulfill at all incident levels - from single incident, single agency to a Area Command. The AA should follow the resource order process for all levels of IBA to ensure documentation of the assignment for the individual.</p>	

A AA GUIDELINES FOR IBA ACTIVATION

AGENCY ADMINISTRATOR GUIDELINES		Actions/Assignment/Remarks
A-IV	<p>Assign an IBA if there is/are:</p> <ol style="list-style-type: none"> 1. Limited unit impacts (single incident under single agency; simple involvement). Generally, local unit resources can fulfill IBA responsibilities. The AA may assign the Head of Administration or other unit personnel as the IBA. Order IBA3 (Incident Business Advisor, Type III) 2. Local unit impacted and other agency involvement. (i.e., single incident with additional agencies involvement and may have support units and/or special team involvement). Local unit identifies need to request additional resources to effectively and efficiently respond to business management needs. Order IBA2 (Incident Business Advisor, Type II) 3. Major impact on local unit. Multiple incidents and/or Incident Management Teams with multiple agency involvement (local, county, state, Federal, National Guard, U.S. Military, Tribal Government, FEMA), political sensitivity and high profile. Order IBA1 (Incident Business Advisor, Type I) 	

A AA GUIDELINES FOR IBA ACTIVATION

IBA ROLE/RESPONSIBILITIES CHECKLIST

The Incident Business Advisor (IBA) serves as liaison and advisor for/to the Agency Administrator (AA), the Incident Management Team (IMT), and the Area Command Team (ACT) for incident business management. The IBA reports to the AA or their designee.

If an Area Commander orders an IBA, the IBA reports to the Area Commander.

Completion of these items is dependent upon the complexity of the incident. Items are not in priority order. This list is not all inclusive and is meant to provide guidelines for accomplishment of IBA duties.		Actions/Assignments/Remarks
B-I	<p><u>Assignment:</u></p> <p>Finalize IBA kit.</p>	
B-II	<p><u>Upon Incident Arrival:</u></p> <ol style="list-style-type: none"> 1. Meet with Agency Administrator (AA) or Area Commander (ACDR) to determine expectations, roles, responsibilities, incident agencies concerns. <ol style="list-style-type: none"> a. Current and projected incident status (resources on site/ordered) b. Agencies involved, political concerns c. Business management issues (cost concerns, claims investigations, payments) d. Need for incident support units (Buying Team, Payment Team, Cost Apportionment Team, etc.) e. Opportunity to provide IBA trainee assignment 	

B ROLE/RESPONSIBILITIES OF IBA

		Action/Assignment/Remarks
B-II cont.	<p>2. Obtain:</p> <ul style="list-style-type: none"> a. Key incident agency and incident support unit contact names (Fire Management Officer (FMO), Administrative Officer (AO), procurement, personnel, Expanded Dispatch (ED), Buying Team (BT), Payment Team, etc.) b. Incident Action Plan (IAP) c. Wildland Fire Situation Analysis (WFSA) d. Incident Management Team (IMT) and Incident Agency briefing schedule e. Incident agency business management guidelines (assist in development as necessary) <ul style="list-style-type: none"> -- Service and Supply Plan <ul style="list-style-type: none"> - Equipment ordering/purchasing/accountability requirements (lease vs. purchase of cellular phones, facsimile machines, computers, etc.) - Distribution of purchased equipment and supplies after incident - Meals and lodging -- Procedures for hiring and paying casuals -- Agreements (master, cost share, cooperative, etc.) -- Geographic area supplements to the Interagency Incident Business Management Handbook (IIBMH) -- Agency Provided Medical Care (APMC) process/availability -- Incident Finance Package (IFP) guidelines -- Procedures for purchasing airline tickets -- Rest and Recuperation policy (R&R) f. Local area and state maps g. Incident agency organization chart, telephone list 	

B ROLE/RESPONSIBILITIES OF IBA

	Action/Assignment/Remarks
<p>B-III. <u>During Incident Assignment:</u></p> <ol style="list-style-type: none"> 1. Identify incident types (fire, flood, earthquake, etc.) and agencies involved to determine application of authorities (emergency pay plan, FEMA, etc.) and the impact on the local units. 2. Identify problems that may be generated due to geographic distance/area and increased organizational complexity (Area Command, Unified Area Command, FEMA, Payment Team, multiple IMT's, etc.). Establish procedures to facilitate communication. 3. Identify additional resources needed to provide business management support: <ul style="list-style-type: none"> Buying Team Payment Team Cost Team(s) for Area Command/IMT IBA assistant Claims Team Experts in cost share agreements, claims, FEMA, Military Need for centralized timekeeping unit at incident agency 4. Meet with incident agency and incident agency support unit personnel to identify and discuss issues, and share information and resources: <ul style="list-style-type: none"> FMO AO and AO staff Buying Team Leader Payment Team Leader Expanded Dispatch Coordinator Cost Apportionment Team Leader 	

B ROLE/RESPONSIBILITIES OF IBA

		Action/Assignment/Remarks
B-III cont.	<p>5. Coordinate and address incident agency's business operating guidelines with IMT, support units and other involved business resources.</p> <ul style="list-style-type: none"> -Review and/or assist in development of cost share agreements -Review interagency agreements and annual operating plans -Review and discuss assignment of incident numbers and impact to incident agency's fiscal staff (payment requirements) -Identify differing fiscal/payment/business needs and requirements to determine and implement the most efficient business practices <ul style="list-style-type: none"> -- Federal and state worker's compensation procedures -- Per diem rates -- Payment of state agreements by federal buying teams -- Claims settlement -- Cost information -- Credit card/convenience check usage/documentation -- Ordered standby and incidents/demobilization centers/staging areas <p>6. Provide AA and IMT updates on IBA activities, decisions, issues and concerns.</p> <p>7. Attend IMT briefings/meetings, team closeouts and other meetings/briefings as appropriate. Provide input into transition: Of incident from one IMT to another From multiple incidents to a complex or complexes Of incident to incident agency</p> <p>8. Review IFP with incident Finance/Administration Section Chief and incident agency representatives</p>	

B ROLE/RESPONSIBILITIES OF IBA

		Action/Assignment/Remarks
B-IV	<p><u>Prior to release from an incident:</u></p> <ol style="list-style-type: none"> 1. Provide IBA narrative, with advice/ recommendations/critique to AA. 2. Participate in transition meeting with replacement IBA, or incident agency AO or designee, and AA. 3. Obtain Performance Evaluation. 4. Provide Performance Evaluation to IBA-Trainee, if one assigned. 5. Provide your post incident contact number. 	

B ROLE/RESPONSIBILITIES OF IBA

INCIDENT BUSINESS ADVISOR (IBA) QUALIFICATIONS

		Actions/Assignment/Remarks
C-I	<p>IBA Type I (major impact on local unit and multiple agency Involvement, high profile incident, national attention)</p> <p>4. Prerequisite Qualifications: IBA2 qualified <u>and</u> minimum one successful assignment as an IBA2</p> <p>5. Prerequisite Experience: Working with complex organizations (i.e., Area Command, Multi-agency Coordinating Group, Unified Command, FEMA)</p> <p>6. Recommended Training: Fire Management Leadership S-520, Advanced Incident Management</p> <p>7. Training Assignment: IBA Type I trainee assignment under a qualified IBA1</p> <p>(1) Recommended training courses are not mandatory. In order to be qualified at a given level, an individual must demonstrate comprehension of the knowledge, and/or skills presented in the training course. In some cases, if an individual has not obtained the knowledge presented in a course, the most efficient method of obtaining the knowledge may be to attend the course.</p> <p>(2) Prior to advancing from a lower level to a higher level of qualification, an individual is expected to complete at least one successful assignment as a qualified IBA at the lower level. In many cases, a number of assignments of varying complexity at a given level is recommended prior to advancement.</p>	

C IBA QUALIFICATIONS

		Actions/Assignment/Remarks
C-II	<p>IBA Type II (significant impact to the local unit and other agency involvement)</p> <p>8. Prerequisite Qualifications: IBA3 qualified <u>and</u> minimum one successful assignment as an IBA3</p> <p>9. Prerequisite Experience: Experience working with Incident Management Teams, interagency cooperators and additional support organizations during incidents (local, county, state, Federal, National Guard, Military, Tribal Government, FEMA) and <u>one</u> of the following:</p> <p style="padding-left: 40px;">Multiple assignments as Type I or Type II section chief on IMT, <u>or</u> Experience working with or within financial/business management. (i.e., buying teams, payment teams, cost share and other agreements, expanded dispatch)</p> <p>c. Required Training: Incident Business Advisor Training Course</p> <p>d. Recommended Training: Fire Management Leadership Local Agency Administrator I-300, Intermediate Incident Command System I-400, Advanced Incident Command System S-301, Leadership and Organizational Development S-420, Command and General Staff S-430, Operations Section Chief, or S-440, Planning Section Chief, or S-450, Logistics Section Chief, or S-460, Finance/Administration Section Chief</p> <p>e. Training Assignment: IBA Level II trainee assignment under a qualified IBA2</p>	

C IBA QUALIFICATIONS

		Actions/Assignment/Remarks
C-II cont.	<p>(1) Recommended training courses are not mandatory. In order to be qualified at a given level, an individual must demonstrate comprehension of the knowledge, and/or skills presented in the training course. In some cases, if an individual has not obtained the knowledge presented in a course, the most efficient method of obtaining the knowledge may be to attend the course.</p> <p>(2) Prior to advancing from a lower level to a higher level of qualification, an individual is expected to complete at least one successful assignment as a qualified IBA at the lower level. In many cases, a number of assignments of varying complexity at a given level is recommended prior to advancement.</p>	
C-III	<p>IBA Level III (limited unit impact)</p> <p>a. Prerequisite Qualifications: Working knowledge of unit and incident business management practices and standards</p> <p>b. Prerequisite Experience: Exposure to administrative/financial management incidents through jobs/interaction with teams/incident assignments</p> <p>c. Recommended Training: Fire Program Management I-200, Basic Incident Command System S-201, Supervisory Concepts and Techniques S-260, Interagency Incident Business Management S-261, Applied Interagency Incident Business Principles S-360, Finance/Administration Unit Leader</p> <p>d. Training Assignment: None</p> <p>(1) Recommended training courses are not mandatory. In order to be qualified at a given level, an individual must demonstrate comprehension of the knowledge, and/or skills presented in the training course. In some cases, if an individual has not obtained the knowledge presented in a course, the most efficient method of obtaining the knowledge may be to attend the course.</p> <p>(2) Prior to advancing from a lower level to a higher level of qualification, an individual is expected to complete at least one successful assignment as a qualified IBA at the lower level. In many cases, a number of assignments of varying complexity at a given level is recommended prior to advancement.</p>	

C

IBA QUALIFICATIONS

IBA Kit Checklist

IBA's should prepare a basic kit prior to assignment. Upon receiving an assignment, the IBA should supplement the kit with agency specific and/or assignment specific material and supplies. The IBA may need to order/obtain assignment specific material upon arrival at the unit.

D-I	<p><u>Supplies</u></p> <p>Pens, pencils, post-it note pads, notepad, calculator, clipboard, briefcase, etc. Ordering unit should be able to supply a cellular telephone and access to computer and printer.</p>
D-II	<p><u>Forms</u></p> <p>IBA evaluation form(s) Emergency Firefighter Time Report, OF-288 (own use) General Message, ICS-213</p>
D-III	<p><u>Reference Material</u></p> <p>Interagency Incident Business Management Handbook, (IIBMH), PMS 902 Fireline Handbook, PMS 410-1 Pay Plan for Emergency Workers (AD Pay Plan) Geographic area supplements to the IIBMH (AD-5 Rates, Equipment Rates, Costs, etc.) Current Incident Business Coordinators list (Federal and State) National Interagency Mobilization Guide, NFES 2092 ***** Local, unit and geographic area telephone listings (obtain from Administrative Representative of Incident Unit) Geographic area specific agreements (Cost share, National Guard, crew, engine/tender, cooperative, etc., obtain from Administrative Representative of Incident Unit) State business management guidelines (obtain from Administrative Representative of Incident Unit) National Interagency Mobile Food Services and Shower Facilities Contract Book, NFES 1276 Call-When-Needed Helicopter Services Contracts, NFES 2168 Interagency Contract Information for Airtanker, Helicopter, Large Transport, Smokejumper Aircraft, NFES 2276 National Interagency Mobile Commissary Services Contract, available from NIFC-FS Contracting, phone 208-387-5347 National Interagency Buying Team Guide (obtain from www.nwcg.gov/pms.htm) Agency Administrator's Guide to Critical Incident Management, NFES 1356 Federal Response Plan, FEMA 229, FEMA Publication Office, 1-800-480-2520 (www.fema.gov/r-n-r/frp/) Military Use Handbook, NFES 2175</p>

D IBA KIT CHECKLIST

APPENDIX A

Incident Business Advisor Application

Incident Business Advisor (IBA) Application

Incident Business Advisor (IBA) Application Instructions:

1. Complete IBA Application.
2. Submit to: National Interagency Fire Center
3833 South Development Avenue
Boise, ID 83705
Attn: Tory Majors, Incident Business Practices Working Team Chair
3. Application will be reviewed by the Interagency IBA Committee, IBA Level qualification assigned, and applicant will be notified in writing.
4. National IBA lists will be established and maintained for the three qualification levels. The lists will be provided to the Geographic Area Coordination Centers by the working team.

PART I

Applicant Name	Date Submitted	
Working Job Title:	Telephone:	E-mail or FAX address:
Agency Mailing Address:		

PART II Training

Identify training completed below.

Date accomplished:

Comptroller Training	_____
Fire Program Management	_____
Fire Management Leadership Local Agency Administrator	_____
Fire Management Leadership	_____
Incident Business Advisor Training	_____
I-200, Basic Incident Command System	_____
I-300, Intermediate Incident Command System	_____
I-400, Advanced Incident Command System	_____
S-201, Supervisory Concepts and Techniques	_____
S-260, Interagency Incident Business Management	_____
S-261, Applied Interagency Business Principles	_____
S-301, Dynamic Leadership and Organizational Development	_____
S-360, Finance/Administration Unit Leader	_____
S-400, Incident Commander	_____
S-420, Command and General Staff	_____
S-430, Operations Section Chief	_____
S-440, Planning Section Chief	_____
S-450, Logistics Section Chief	_____
S-460, Finance/Administration Section Chief	_____
S-520, Advanced Incident Management	_____

List other training completed and dates pertinent to this position:

Incident Business Advisor (IBA) Application Continued

PART III Experience

(List assignments from previous three years)

	Position Title	Dates	Type (1,2,3,AC)	Incident Name	Incident Supervisor Name
IMT Assignments (primary and trainee)					
Other incident assignments					
Comptroller assignments					
Home unit business management experience					

Applicant Signature:

Submission of this application implies availability for assignment as an Incident Business Advisor at the level qualified and/or at the trainee level identified.

Authorizing Name, Signature, Telephone Number (Current Supervisor)	Date
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APPENDIX B

Individual Performance Rating

INDIVIDUAL PERFORMANCE RATING		INSTRUCTIONS: The Agency Administrator or designated individual completes the form prior to release of the Incident Business Advisor. The IBA forwards a copy of the rating to the Interagency IBA Committee.			
1. NAME		2. INCIDENT NAME AND NUMBER		START DATE OF INCIDENT	
3. HOME UNIT ADDRESS		4. INCIDENT AGENCY AND ADDRESS			
5. POSITION HELD ON INCIDENT INCIDENT BUSINESS ADVISOR Level: I II III		6. TRAINEE POSITION ____YES ____NO	7. INCIDENT COMPLEXITY ____1 ____2 ____3		8. DATE OF ASSIGNMENT FROM: TO:
EXPLAIN IN REMARKS <small>List additional duties on which the position will be rated.</small> Enter X under the appropriate column indicating the individual's level of performance for each duty listed.		PERFORMANCE LEVEL			
		Did not apply on this Incident	Unacceptable	Need to Improve	Fully Successful
Communicates effectively with Agency Administrator, Incident Management					
Team and Related support units.					
Identifies issues/problems; provides guidance and recommendations for resolution.					
Provides written narrative of IBA activities					
Effectively responds to incident and unit needs; provides sound business management advice and guidance.					
10. REMARKS					
11. THIS RATING HAS BEEN DISCUSSED WITH ME (signature of individual being rated.)				12. DATE	
13. RATED BY (Signature)		14. HOME UNIT	15. POSITION HELD ON THIS INCIDENT		16. DATE