

Incident Management Team Position Task Book

# All-Hazards Logistics Section Chief

March 15, 2007



**FEMA**

*Incident Management Team Position Task Book*

# All-Hazards Logistics Section Chief

Version: LSC.1

March 15, 2007

**POSITION TASK BOOK ASSIGNED TO:**

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INDIVIDUAL'S NAME, DUTY STATION, AND PHONE NUMBER

**POSITION TASK BOOK INITIATED BY:**

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OFFICIAL'S NAME, TITLE, DUTY STATION, AND PHONE NUMBER

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LOCATION AND DATE THAT POSITION TASK BOOK WAS INITIATED

# EVALUATOR

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

VERIFICATION/CERTIFICATION OF COMPLETED POSITION TASK BOOK FOR THE POSITION OF

## FINAL EVALUATOR'S VERIFICATION

I verify that all tasks have been performed and are documented with appropriate initials.

I also verify that \_\_\_\_\_  
has performed as a trainee and should therefore be considered for certification in this position.

\_\_\_\_\_  
FINAL EVALUATOR'S SIGNATURE AND DATE

\_\_\_\_\_  
EVALUATOR'S PRINTED NAME, TITLE, DUTY STATION, AND PHONE NUMBER

## AGENCY HEAD RECOMMENDATION FOR CERTIFICATION

I certify that \_\_\_\_\_  
has met all requirements for qualification in this position and I recommend that they be certified for  
the position.

\_\_\_\_\_  
OFFICIAL'S SIGNATURE AND DATE

\_\_\_\_\_  
OFFICIAL'S NAME TITLE, DUTY STATION, AND PHONE NUMBER

# INCIDENT MANAGEMENT SYSTEM POSITION TASK BOOK

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Position Task Books (PTBs) were developed for designated positions as described under the National Interagency Incident Management System (NIIMS) and have been incorporated into the National Incident Management System (NIMS). The position task book is used by the authority having jurisdiction to certify that the person to whom the task book belongs meets the standards recommended by the National (NIMS) Integration Center (NIC).

Each PTB lists the performance requirements (tasks) for the specific position in a format that allows a trainee to be evaluated against written guidelines. Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation that the trainee be certified in that position. Evaluation and confirmation of the individual's performance of all the tasks may involve more than one evaluator and can occur on incidents, in classroom simulation, and in other work situations. Designated PTBs require position performance during which the majority of required tasks are demonstrated on a single incident. It is important that performance be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated. All bullet statements within a task that require an action (contain an action verb) must be demonstrated before that task can be signed off.

A brief list of responsibilities also appears below.

## RESPONSIBILITIES:

1. The **Agency Management** is responsible for:
  - Selecting trainees based on the needs of their organization or area Incident Management Teams.
  - Providing opportunities for evaluation and/or making the trainee available for evaluation.
  
2. The **Individual** is responsible for:
  - Reviewing and understanding instructions in the PTB.
  - Identifying desired objectives/goals.
  - Providing background information to an evaluator.
  - Satisfactorily demonstrating completion of all tasks for an assigned position within three years.
  - Assuring the evaluation record is complete.
  - Notifying the local agency head when the PTB is completed, and obtaining their signature recommending certification.
  - Keeping the original PTB in personal records.
  
3. The **Evaluator** is responsible for:
  - Being qualified and proficient in the position being evaluated.
  - Meeting with the trainee and determining past experience, current qualifications, and desired objectives/goals.
  - Reviewing tasks with the trainee.
  - Explaining to the trainee the evaluation procedures that will be utilized and which objectives may be attained.
  - Identifying tasks to be performed during the evaluation period.

- Accurately evaluating and recording demonstrated performance of tasks. Dating and initialing completion of the task shall document satisfactory performance. Unsatisfactory performance shall be documented in the Evaluation Record.
  - Completing the Evaluation Record found at the end of each PTB.
4. The **Final Evaluator** is responsible for signing the verification statement inside the front cover of the PTB when all tasks have been initialed.
5. The **Agency Head** or designee is responsible for:
- Issuing the PTB to document task performance.
  - Explaining to the trainee the purpose and processes of the PTB, as well as the trainee's responsibilities.
  - Tracking progress of the trainee.
  - Identifying incident evaluation opportunities.
  - Identifying and assigning an evaluator that can provide a positive experience for the trainee, and make an accurate and honest appraisal of the trainee's performance.
  - Documenting the assignment.
  - Conducting progress reviews.
  - Conducting a closeout interview with the trainee and evaluator and assuring that documentation is proper and complete.

## Competency 1: Assume position responsibilities

*Description: Successfully assume role of Logistics Section Chief and initiate position activities at the appropriate time according to the following behaviors.*

### Behavior 1: Ensure readiness for assignment.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
<p>1. Obtain and assemble information and materials needed for kit. Kit will be assembled and prepared prior to receiving an assignment. Kit will contain critical items needed for the assignment and items needed for functioning during the first 48 hours. Kit will be easily transportable and within agency weight limitations. The basic information and materials needed <b>may include</b>, but is not limited to, any of the following:</p> <p><b>Reference Materials</b></p> <ul style="list-style-type: none"> <li>• Appropriate references for the incident type and agencies involved.</li> <li>• Field Operations Guide ICS 420-1.</li> <li>• Position manuals for the section.</li> <li>• Individual checklists/reminders.</li> <li>• Department of Transportation Emergency Response Guide Book, NFES 2150.</li> <li>• Emergency Equipment Shift Ticket, NFES 0872.</li> <li>• Crew Time Report, NFES 0891.</li> <li>• National Mobile Food Service/Shower Contract.</li> <li>• IMT contact information.</li> </ul> <p><b>Forms</b></p> <ul style="list-style-type: none"> <li>• ICS Form 205, Incident Radio Communication Plan.</li> <li>• ICS Form 206, Medical Plan.</li> <li>• ICS Form 213, General Message.</li> <li>• ICS Form 214, Unit Log.</li> <li>• ICS Form 260-1, Resource Order Form (four part), NFES 1470.</li> <li>• Agency specific forms appropriate to the function.</li> <li>• OF-296, Vehicle/Heavy Equipment Inspection Form, NFES 1173.</li> </ul> <p><b>Supplies</b></p> <ul style="list-style-type: none"> <li>• Pens/pencils/note paper/etc.</li> <li>• Office supplies appropriate to the function.</li> </ul>	O		

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**Behavior 2: Ensure readiness of self and subordinates [crew] for assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Arrive properly equipped at incident assigned location within acceptable time limits.	I		
2. Check in according to agency guidelines.	I		

**Behavior 3: Ensure availability, qualifications, and capabilities of resources to complete assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Identify units within the section to be activated and resources required for section operation.	I		
2. Coordinate the order request after resources are identified.	I		
3. Determine logistics section current capabilities and limitations. <ul style="list-style-type: none"> <li>• Ordering time line.</li> <li>• Available equipment.</li> <li>• Resources on hand; e.g., supplies, drivers, personnel.</li> <li>• Facilities capabilities; e.g., camps.</li> </ul>	I		

**Behavior 4: Gather, update, and apply situational information relevant to the assignment.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain complete information from dispatch upon activation. <ul style="list-style-type: none"> <li>• Incident name.</li> <li>• Incident order number.</li> <li>• Request number.</li> <li>• Reporting location.</li> <li>• Reporting time.</li> <li>• Transportation arrangements/travel routes.</li> <li>• Contact procedures during travel (telephone/radio).</li> </ul>	O		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
<p>2. Gather information necessary to assess incident assignment and determine immediate needs and actions.</p> <ul style="list-style-type: none"> <li>• Incident Commander’s name and agency address.</li> <li>• Type of incident.</li> <li>• Current resource commitments.</li> <li>• Current situation.</li> <li>• Expected duration of assignment.</li> <li>• Terrain.</li> <li>• Weather.</li> <li>• Agency Administrator’s briefing/other briefing requirements (as appropriate).</li> </ul>	I		
<p>3. Obtain briefing from Agency Administrator/ outgoing Incident Commander and gather information.</p> <ul style="list-style-type: none"> <li>• Ensure that briefings from Agency Administrator/ outgoing Incident Commander are complete and include, as a minimum description: Incident Objectives, ICS Form 201, organizational structure (area command or single organization), special considerations on the incident, the current national situation and Wildland Fire Situation Analysis (if wildland fire incident).</li> <li>• Collect information on current resources assigned, en route, on order, and local resource status including initial attack/response as it relates to the logistics section. These information sources may include: agency dispatcher, Initial Attack/Response Incident Commander, overhead, resource advisor, etc.</li> <li>• Determine facilities established and operating.</li> <li>• Obtain anticipated incident duration, size, and type.</li> <li>• Complete the appropriate checklist for takeover of incidents.</li> </ul>	I		
<p>4. Collect information from outgoing Logistics Section Chief, initial Incident Commander or other personnel responsible for incident prior to your arrival.</p> <ul style="list-style-type: none"> <li>• Obtain status of incident and assigned resources.</li> <li>• Obtain status of existing logistics section.</li> <li>• Obtain information on location situations; e.g., ICP/ base locations, medical facilities, road closures, camp locations, etc.</li> </ul>	I		

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**Behavior 5: Establish effective relationships with relevant personnel.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish and maintain positive interpersonal and interagency working relationships. <ul style="list-style-type: none"> <li>• Local agencies.</li> <li>• Hosting unit.</li> <li>• Public.</li> <li>• Division/Group Supervisors.</li> <li>• Command and General Staff</li> </ul>	I		
2. Create a work environment that provides mutual respect and equal opportunity for all personnel assigned to the incident.	I		

**Behavior 6: Establish organization structure, reporting procedures, and chain of command of assigned resources.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Plan and activate section. <ul style="list-style-type: none"> <li>• Identify units within the section to be activated and resources required for section operation.</li> <li>• After resources are identified, coordinate the order request.</li> <li>• Identify work space requirements and determine locations.</li> <li>• Brief unit leaders including summary of incident, current activity, and anticipated section activity for individual unit planning.</li> <li>• Provide initial operating instructions to section personnel, including safety and security concerns and expectations.</li> </ul>	I		

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**Behavior 7: Understand and comply with ICS concepts and principles.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Maintain appropriate span of control.	I		
2. Demonstrate knowledge of ICS structure, principles, positions, and ICS forms.	I		
3. Understand scope, roles, responsibilities, jurisdiction, and authority of responder agencies.	I		
4. Assure execution of appropriate administrative requirements (to include documentation, ICS forms, personnel and equipment time records, performance ratings).	I		

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## Competency 2: Lead assigned personnel

*Description: Influence, guide, and direct assigned personnel to accomplish objectives and desired outcomes in a rapidly changing, high-risk environment.*

### Behavior 1: Model leadership principles of Duty, Respect and Integrity.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Exhibit principles of duty. <ul style="list-style-type: none"> <li>• Be proficient in your job, both technically and as a leader.</li> <li>• Make sound and timely decisions.</li> <li>• Ensure that tasks are understood, supervised and accomplished.</li> <li>• Develop your subordinates for the future.</li> </ul>	I		
2. Exhibit principles of respect. <ul style="list-style-type: none"> <li>• Know your subordinates and look out for their well-being.</li> <li>• Keep your subordinates informed.</li> <li>• Build the team.</li> <li>• Employ your subordinates in accordance with their capabilities.</li> </ul>	I		
3. Exhibit principles of integrity. <ul style="list-style-type: none"> <li>• Know yourself and seek improvement.</li> <li>• Seek responsibility and accept responsibility for your actions.</li> <li>• Set the example.</li> </ul>	I		

### Behavior 2: Ensure the safety, welfare, and accountability of assigned personnel.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Recognize potentially hazardous situations.	I		
2. Inform subordinates of hazards.	I		
3. Control positions and function of resources.	I		
4. Ensure that special precautions are taken when extraordinary hazards exist.	I		
5. Ensure adequate rest is provided to all unit personnel.	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
6. Ensure Hazmat regulations, other national standards, and protocols are met.	I		
7. Ensure unit provides and supports a hostile free work environment.	I		
8. Ensure ADA requirements are being met.	I		

**Behavior 3: Establish work assignments and performance expectations, monitor performance, and provide feedback.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Provide initial operating instructions to section personnel, including safety and security concerns and expectations.	O		
2. Perform the duties of a Communications Unit Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Develop plans for effective use of incident communications equipment and facilities.</li> <li>• Installing and testing of communications equipment.</li> <li>• Supervision of the Incident Communications Center.</li> <li>• Distribution of communications equipment to incident personnel.</li> <li>• Maintenance and repair of communications equipment.</li> <li>• Prepare all forms and required documentation necessary to perform this position.</li> </ul>	I		
3. Perform the duties of a Medical Unit Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Develop the Medical Plan.</li> <li>• Obtain medical aid and transportation for injured and ill incident personnel.</li> <li>• Establishment of responder rehabilitation.</li> <li>• Preparation of reports and records.</li> <li>• Prepare all forms and required documentation necessary to perform this position.</li> </ul>	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
4. Perform the duties of a Food Unit Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Supply food for entire incident (including remote locations).</li> </ul>	I		
5. Perform the duties of a Supply Unit Leader according to the most current version of the Field Operations Guide (ICS 420). <ul style="list-style-type: none"> <li>• Order personnel, equipment and supplies.</li> <li>• Receive and store all supplies for the incident.</li> <li>• Maintain an inventory of supplies.</li> <li>• Service nonexpendable supplies and equipment.</li> <li>• Prepare all forms and required documentation necessary to perform this position.</li> </ul>	I		
6. Perform the duties of a Facilities Unit Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Layout and activation of incident facilities (e.g., ICP, base camps).</li> <li>• Provide sleeping and sanitation facilities.</li> <li>• Provide security.</li> <li>• General maintenance.</li> <li>• Prepare all forms and required documentation necessary to perform this position.</li> </ul>	I		
7. Perform the duties of a Ground Support Unit Leader according to the most current version of the Field Operations Guide (ICS 420-1). <ul style="list-style-type: none"> <li>• Support out of service resources.</li> <li>• Transportation of personnel, supplies, food, and equipment.</li> <li>• Fueling, service, maintenance, and repair of vehicles and other ground support equipment.</li> <li>• Develop and implement Incident Traffic Plan.</li> <li>• Prepare all forms and required documentation necessary to perform this position.</li> </ul>	I		
8. Establish priorities and coordinate units within the section.	I		
9. Communicate job performance requirements to subordinates.	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
10. Continuously evaluate performance.	I		
11. Communicate deficiencies immediately and take corrective action.	I		
12. Identify training needs and provide opportunities for training.	I		
13. Prepare and discuss formal performance evaluation.	I		
14. Ensure that performance ratings are completed as required by the Incident Commander/Agency Administrator. <ul style="list-style-type: none"> <li>• Discuss ratings with individual.</li> <li>• Ensure contractor/vendor evaluation is completed.</li> </ul>	I		

**Behavior 4: Emphasize teamwork.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Ensure interaction occurs among Logistics Section units.	I		

**Behavior 5: Coordinate interdependent activities.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Interact and coordinate with all command and general staff. <ul style="list-style-type: none"> <li>• Receive and transmit current and accurate information.</li> </ul>	I		
2. Coordinate with unit leaders and provide Planning Section Chief a list of excess personnel, contract equipment, crews, miscellaneous personnel and other resources. List will include: <ul style="list-style-type: none"> <li>• Name/type.</li> <li>• Quantity.</li> <li>• Time/date of available release.</li> <li>• Review the list daily for accuracy ensuring that all units are demobilized in a timely and complete manner.</li> </ul>	I		

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### Competency 3: Communicate effectively

*Description: Use suitable communication techniques to share relevant information with appropriate personnel on a timely basis to accomplish objectives in a rapidly changing, high risk environment*

#### Behavior 1: Ensure all relevant information is exchanged during check-in, briefings and debriefings.

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Obtain briefing from Agency Administrator/ outgoing Incident Commander and gather information. <ul style="list-style-type: none"> <li>• Ensure that briefings are complete and include, as a minimum description: Incident Objectives, ICS Form 201, organizational structure (area command or single organization), special considerations on the incident, and the current national situation and Wildland Fire Situation Analysis (if wildland fire incident).</li> <li>• Collect information on current resources assigned, en route, on order, and local resource status including initial attack as it relates to the logistics section. These information sources may include: agency dispatcher, Initial Attack Incident Commander, overhead, resource advisor, etc.</li> <li>• Determine facilities established and operating.</li> <li>• Obtain anticipated incident duration, size, and type.</li> <li>• Complete the appropriate checklist for takeover of incidents.</li> </ul>	I		
2. Obtain briefing from Incident Commander. May be one-on-one or in an Incident Management Team (IMT) meeting. <ul style="list-style-type: none"> <li>• Receive Incident Commander's priorities, goals, and objectives for the IMT.</li> <li>• Receive Incident Commander's priorities, goals, and objectives for the incident.</li> <li>• Obtain initial instructions concerning the tasks expected of the logistics section.</li> <li>• Receive expected time frames for briefings, planning meetings, and team meetings.</li> </ul>	I		
3. Brief unit leaders including summary of incident, current activity, and anticipated section activity for individual unit planning.	I		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
4. Conduct logistics section meeting and/or briefing. <ul style="list-style-type: none"> <li>Review proposed IAP.</li> <li>Identify possible changes by units to meet current IAP.</li> <li>Confirm needs and requests or reassign personnel as needed.</li> <li>Review current and future situation status, resource status, fire behavior (wildland fire incident), and weather forecast.</li> <li>Ensure applicable plans; e.g., medical, security, transportation, communications, etc., are updated and provided to plans unit.</li> <li>Ensure special instructions are included in the IAP for the next and future operational periods.</li> </ul>	I		
5. Participate in the operational period briefing, particularly emphasizing any changes from the written IAP.	I		
6. Update Incident Commander on current accomplishments and/or problems. <ul style="list-style-type: none"> <li>Verbally inform Incident Commander as soon as possible on problems and accomplishments.</li> </ul>	I		
7. Debrief Agency Administrator. Debriefing may be for a designated representative or incoming LSC. <ul style="list-style-type: none"> <li>Participate in debriefing.</li> </ul>	I		

**Behavior 2: Ensure documentation is complete and disposition is appropriate.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Complete ICS Form 214, Unit Log. <ul style="list-style-type: none"> <li>Submit completed and legible Unit Logs containing pertinent information to the documentation unit for each operational period.</li> <li>Document problems and accomplishments.</li> </ul>	O		
2. Ensure all personnel and equipment time records are complete and have been submitted to the Time Unit Leader/Equipment Time Recorder at the end of each operational period.	O		

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TASK	CODE	EVALUATION RECORD #	EVALUATOR
3. If required, complete ICS Form 211, Demobilization Check-Out, and turn in to the appropriate person.	O		
4. Participate in after-incident review per agency policy.	I		

**Behavior 3: Communicate and assure understanding of work expectations within the chain of command and across functional areas.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Evaluate and share with IMT all functional information for your section and what is anticipated for incident operations based on expected duration, size, and type of incident.	I		

**Behavior 4: Develop and implement plans and gain concurrence of affected agencies and the public.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Participate in preparation of Incident Action Plan (IAP). <ul style="list-style-type: none"> <li>• Review proposed tactics for next operational period or periods.</li> <li>• Advise on current capabilities and limitations.</li> <li>• Determine additional resources needed.</li> <li>• Discuss long range plans and identify potential or future requirements.</li> <li>• Prepare or review applicable portions of the IAP; e.g., Medical Plan, Security Plan, Transportation Plan, special instructions.</li> </ul>	I		
2. Assist in development, approval, and implementation of Demobilization Plan and/or Transition Plan. <ul style="list-style-type: none"> <li>• Coordinate with the demobilization unit/ Planning Section Chief during development and implementation of Demobilization Plan.</li> <li>• Coordinate during development and implementation with local agency concerning functional demobilization procedures.</li> <li>• Brief staff on demobilization responsibilities.</li> </ul>	I		

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**Competency 4: 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 timeframe.*

**Behavior 1: Administer and/or apply agency policy, contracts and agreements.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Act as the contractor’s authorized representative (COR) for national contracts and/or local agency specific contracts. <ul style="list-style-type: none"> <li>• Supervise the Contracting Officers Technical Representative (COTR).</li> <li>• Coordinate as needed with Finance/Administration Section Chief.</li> </ul>	I		

**Behavior 2: Gather, analyze, and validate information pertinent to the incident or event and make recommendations for setting priorities.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Evaluate and monitor current situation. <ul style="list-style-type: none"> <li>• Determine if current logistics capabilities will meet incident objectives.</li> <li>• Identify problems and concerns (evacuation, sheltering, aviation safety, etc.) for which logistics may be part of the solution.</li> <li>• Advise Incident Commander and other appropriate incident management team personnel.</li> </ul>	I		
2. Anticipate and identify kind, type, and number of resources required to achieve objectives. <ul style="list-style-type: none"> <li>• Consider incident type and complexity, kinds and types of resources, resource availability, and safety factors.</li> <li>• Order necessary personnel and equipment.</li> <li>• Discuss long-range and contingency plans and identify potential and future resources.</li> </ul>	I		

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**Behavior 3: Make appropriate decisions based on analysis of gathered information.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Establish priorities and coordinate units within the section.	I		

**Behavior 4: Modify approach based on evaluation of incident situation.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Determine additional resources needed.	I		
2. Discuss long range plans and identify potential or future requirements	I		
3. Identify possible changes by unit to meet current IAP	I		

**Behavior 5: Plan for demobilization and ensure demobilization procedures are followed.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Consider demobilization and/or transition early enough during the incident so that an adequate Demobilization/Transition Plan is in place prior to the actual need to release resources or escalate the incident.	I		
2. Receive demobilization/transition instructions from the appropriate person. <ul style="list-style-type: none"> <li>• Brief subordinate staff on demobilization/transition procedures and responsibilities. Ensure that incident and agency demobilization/transition procedures are followed.</li> <li>• If required, complete ICS Form 211, Demobilization Check-Out, and turn in to the appropriate person.</li> <li>• Brief replacement if necessary.</li> </ul>	I		

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R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

**Behavior 6: Transfer position duties while ensuring continuity of authority and knowledge and taking into account the increasing or decreasing incident complexity.**

TASK	CODE	EVALUATION RECORD #	EVALUATOR
1. Consider demobilization and/or transition early enough during the incident so that an adequate Demobilization/ Transition Plan is in place prior to the actual need to release resources or escalate the incident.	I		
2. Coordinate the development, approval and implementation of transfer of command when incident escalates/deescalates.	I		
3. Monitor and document progress towards incident objectives and prepare for transition.	I		
4. Determine with replacement time of transfer.	I		
5. Communicate transfer of command to logistics and command staff.	I		
6. If necessary, coordinate with agencies about transfer of command back to local jurisdiction.	I		

**Code:**

- O = task can be completed in any situation (classroom, simulation, incident, daily job, etc.)
- I = task must be performed on an incident
- R = rare event – the evaluation assignment may not provide opportunities to demonstrate performance. The evaluator may be able to determine skills/knowledge through interview or the home office may need to arrange for another assignment or a simulation.

## INSTRUCTIONS FOR COMPLETING THE EVALUATION RECORD

There are four separate blocks allowing evaluations to be made. These evaluations may be made on incidents, simulations in classroom, or in daily duties, depending on what the position task book indicates. This should be sufficient for qualification in the position if the individual is adequately prepared. If additional blocks are needed, a page can be copied from a blank task book and attached.

### Complete These Items at the START of the Evaluation Period:

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**Evaluator's name, incident/office title, and agency:** List the name of the Evaluator, his/her incident position or office title, and agency.

**Evaluator's home unit address and phone:** Self-explanatory

**#:** The number next to the evaluator's name in the upper left corner of the evaluation record identifies a particular incident or group of incidents. This number should be placed in the column labeled "Evaluation Record #" on the PTB for each task performed satisfactorily. This number will enable reviewers of the completed PTB to ascertain the qualifications of the different evaluators prior to making the appropriate sign-off on the PTB.

**Location of Incident/Simulation:** Identify the location where the tasks were performed by agency and office.

**Incident Kind:** Enter kind of incident; e.g., Hazmat, wildland fire, structural fire, search and rescue, flood, tornado, etc.

### Complete These Items at the END of the Evaluation Period:

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**Number and Type of Resources:** Enter the number of resources and types assigned to the incident pertinent to the Trainee's task book position.

**Duration:** Enter inclusive dates during which the Trainee was evaluated. This block may indicate a span of time covering several small and similar incidents if the Trainee has been evaluated on that basis; e.g., several initial attack wildfires in similar fuel types.

**Recommendation:** Check as appropriate and/or make comments regarding the future needs for development of this trainee.

**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 relevant certification:** List **your** certification relevant to the Trainee position you supervised.

# Evaluation Record

TRAINEE NAME

TRAINEE POSITION

#1	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
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. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

#2	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
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. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

**Evaluation Record**  
(Continuation Sheet)

\_\_\_\_\_  
TRAINEE NAME

\_\_\_\_\_  
TRAINEE POSITION

#3	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
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. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				

#4	Evaluator's name: Incident/office title & agency:			
Evaluator's home unit address & phone:				
Name and Location of Incident or Situation <i>(agency &amp; area)</i>	Incident Kind <i>(Hazmat, tornado, flood,                  structural fire, wildfire,                  search &amp; rescue, etc.)</i>	Number & Type of Resources Pertinent to Trainee's Position	Duration <i>(inclusive dates                  in trainee status)</i>	
			to	
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. _____ The individual has successfully performed all tasks for the position and should be considered for certification. _____ The individual was not able to complete certain tasks (comments below) or additional guidance is required. _____ Not all tasks were evaluated on this assignment and an additional assignment is needed to complete the evaluation. _____ The individual is severely deficient in the performance of tasks for the position and needs further training (both required & knowledge and skills needed) prior to additional assignment(s) as a Trainee.				
Recommendations: _____ _____				
Date: _____ Evaluator's initials: _____ Evaluator's relevant agency certification or rating: _____				