POSITION TASK BOOK FOR THE POSITION OF

COST UNIT LEADER (SINGLE TYPE)

Version: June 2021

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:
EMAIL:
POSITION TASK BOOK INITIATED BY:
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:
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:
EMAIL:

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:
EMAIL:

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 Qualifications 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 an AHJ 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. Bullet statements within a task are only examples and do not need to be performed to have a task signed off.

PTB Task Codes

For each of the tasks listed in the Position Task Book (PTB), there are one or more codes describing the circumstances in which the trainee can perform tasks related to the position. If a task has multiple codes listed, it means the evaluator can assess the trainee on any of those circumstances as opposed to evaluating the trainee on all of the listed codes.

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

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

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

Code I: Task performed on an incident or event managed under ICS. Examples of incidents and events that may employ ICS include but are not limited to an oil spill, search and rescue, hazardous material 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. *Note:* Assignment of Code R is not recommended. However, AHJs may add at their discretion to tasks added to NQS PTBs.

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 jurisdiction address and phone: List evaluator's home jurisdiction 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 jurisdiction 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: _____The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. _____The trainee could not complete certain tasks or needs additional guidance. See comments below. _____Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation. _____ 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:

COST UNIT LEADER (SINGLE TYPE)

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Cost Unit Leader and initiate position activities at the appropriate
time according to the following behaviors.

1a. Behavior: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable ● Supplies: ○ Office supplies appropriate to the function ○ Authority Having Jurisdiction (AHJ) identification badge and qualification card ● Reference materials: ○ Functional guidelines relative to incident type (agency guidance or other functional guidelines) ○ AHJ operations guides or other operational guides ○ Position manuals ● Forms: ○ Agency-specific forms appropriate to the function	E, F, I		
2. Obtain complete incident and logistical information: ● Incident name, number, anticipated duration, size, type, responsibilities and expectations ● Reporting time and location ● Transportation arrangements and travel routes ● Contact procedures during travel (telephone/radio) ● Expected working conditions ● Personal Protective Equipment (PPE) ● Security measures ● Updated contact information and information links	E, F, I		
3. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines ● Arrive with go-kit and any additional equipment ● Carry out check-in procedures and ensure assigned personnel do the same	E, F, I		

1b. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

4. Receive briefing from the Finance/Administration Section Chief or outgoing Cost Unit Leader: ● Meetings and briefings schedule ● Situational assessment ● Incident objectives ● Strategy ● Hazards to incident personnel and public ● Agencies/jurisdictions involved ● Organizational structure ● Resources summary ● Logistical needs ● Ordering procedures ● Incident priorities and status: life safety, incident stabilization, property and environment ● Timing scheduling ● Expected products	E, F, I		
5. Obtain and review necessary documentation: ● Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU) ● Applicable plans and reports ● Directories: phone, notification ● Written incident status summary ● Authorizations: cell phones, rental vehicles, computers	E, F, I		

1c. Behavior: Establish or determine organizational structure, resource and staffing needs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Evaluate staffing needs required to manage the unit: ● Ensure consistency with National Incident Management System (NIMS) organizational structure ● Identify training opportunities ● Ensure use of established procedures for ordering resources ● Request appropriate technical specialists to assist with special incident conditions	E, F, I		
7. Utilize unit personnel: ● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control	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: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
8. Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: ● Establish and modify an effective organization based on changing incident and resource conditions ● Maintain appropriate span of control ● Act as a representative of incident leadership	E, F, I		
9. Create a positive work environment: ● Communicate leader's intent and guidance ● Manage unit and its activities effectively ● Proactively assume responsibility for the unit and initiate action	E, F, I		
10. Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
11. Establish and maintain positive interpersonal and interagency working relationships: ● Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies	E, F, I		

2b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Communicate with assigned personnel: ● Communicate priorities, objectives, strategies and any changes ● Inform personnel of their assigned tasks and expectations ● Clearly explain conflict resolution procedures and ensure that personnel understand ● Ensure that assigned objectives and expectations for the operational period are reasonable and accurate	E, F, I		
13. Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements: ● Federal, state, local, tribal, territorial and regional relationships, as appropriate ● Roles and responsibilities of potential responder agencies ● Scope, jurisdiction and authority of potential responder agencies' contingency plans	E, F, I		
14. Supervise and hold personnel accountable for executing assigned tasks: ● Identify and promptly resolve disagreements, issues and misunderstandings ● Prioritize work while considering immediate support for incident operations	E, F, I		

15. Ensure debriefings occur and participate as necessary: ● Ensure incident situation status information is current and complete	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
16. Evaluate mental and physical fatigue of assigned personnel: ● Ensure adequate rest is provided to section personnel	E, F, I		
17. Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk: ● Adjust operations in response to hazards, weather and other relevant events	E, F, I		
18. Demonstrate knowledge of and comply with relevant health and safety requirements: ● Direct and oversee unit operations to ensure compliance with health and safety considerations and guidelines ● Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines	E, F, I		
19. Report or explain the procedures for reporting unexpected occurrences, such as fire, death, injury, illness, exposure to pathogens or hazardous materials (HAZMAT), accident, political contact or property loss or damage: ● Ensure report contains nature of event, location, magnitude, personnel involved and initial action taken (such as helicopter picking up injured or an appropriate subsequent action) ● Ensure the protection of Personally Identifiable Information (PII) while reporting ● Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel	E, F, I		

2d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Demonstrate the ability to identify opportunities for universal accessibility.	E, F, I, J		
21. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.	E, F, I, J		
22. Provide equal access, disability accommodations and access and functional needs (AFN) accommodations.	E, F, I, J		

3. Competency: Conduct operations and ensure completion of assigned tasks

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.

3a. Behavior: Set the unit priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Attend and participate in strategy meetings as necessary: ● Assess organizational needs ● Identify additional resource needs ● Identify critical factors to ensure unit success ● Prioritize incident and unit objectives	E, F, I		
24. Disseminate priorities and expected completion timelines to staff.	E, F, I		
25. Analyze work assignments and staffing levels to ensure achievement of unit objectives.	E, F, I		
26. Hold staff accountable for communicated priorities and deadlines.	E, F, I		

3b. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
27. Participate in the planning process: ● Prepare for and participate in planning meetings ● Assist in the development of plans, as necessary: ○ Long-range ○ Strategic ○ Contingency ○ Demobilization ○ Continuity of Operations Plan (COOP)	E, F, I		
28. Review, validate and modify plans: ● Analyze alternate strategies and explain decisions ● Validate or revise unit objectives ● Review information covering health and safety principles, known hazards and importance of all periods ● Validate unit organizational structure ● Validate unit resource assignments ● Review reserve resources ● Evaluate immediate support needs	E, F, I		
29. Approve completed plans: ● Ensure plans are complete, accurate, realistically attainable and relevant to the incident objectives	E, F, I		

3c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
30. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		

31. Establish effective relationships and coordinate with incident personnel: ● IMT personnel ● Other supporting personnel	E, F, I		
32. Coordinate with the Finance/Administration Section Chief: ● Determine reporting timelines ● Determine required standard and special reports ● Determine report format	E, F, I		
33. Verify incident resources with Logistics Section.	E, F, I		

3d. Behavior: Apply agency policy, contracts and agreements

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
34. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		
35. Complete all work according to organization/agency direction, policy and incident objectives: ● Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives	E, F, I		

3e. Behavior: Ensure documentation is complete

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
36. Review documents for accuracy, timeliness and appropriate distribution.	E, F, I		
37. Maintain and collect personal records related to incident: ● Time sheets ● Rental records ● Accident forms ● Property records ○ Equipment time records ● Receipts	E, F, I		
38. Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs: ● Property loss/damage reports ● Agency-required incident reports ● Activity log ● Changes in strategy and tactics	E, F, I		
39. Ensure the protection of PII.	E, F, I		
40. Ensure that hard copies and electronic copies of cost policies, procedures and reference materials are accessible.	E, F, I		

3f. Behavior: Obtain, record and analyze relevant Cost data

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

41. Obtain and record all cost data: ● Agency equipment costs ● Contract or mutual aid equipment costs ● Contract or mutual aid personnel costs ● Damage to facilities, infrastructure, equipment or vehicles ● Supplies ● Food ● Facility rentals	E, F, I		
42. Identify all equipment and personnel requiring payment in cost reports.	E, F, I		
43. Make recommendations on cost savings to Finance/Administration Section Chief in coordination with other appropriate sections.	E, F, I		
44. Assist in the development of relevant cost-sharing agreements: ● Determine costs to track	E, F, I		
45. Evaluate and analyze information regarding incident costs.	E, F, I		
46. Provide programmatic and operational technical assistance to internal and external stakeholders: ● Burn rates of resources, in coordination with the Logistics Section ● Effective and efficient processes for obtaining cost data ● Cost savings recommendations ● Recommendations for recording cost data	E, F, I		

3g. Behavior: Account for incident costs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
47. Track costs in accordance with appropriate cost-sharing agreements.	E, F, I		
48. Prepare resources using cost estimates and share with appropriate sections.	E, F, I		
49. Separate disaster-related expenses from regular expenses.	E, F, I		
50. Designate a person to coordinate records management.	E, F, I		
51. Capture labor hours, rates, work locations and description of work performed.	E, F, I		
52. Capture equipment information: ● Rented equipment cost and location ● Equipment damaged or destroyed: by inventory number, location and costs to repair or replace ● Equipment hours, rates and locations	E, F, I		
53. Capture relevant service-related information: ● Contracted construction services and costs by site ● Technical consultant service costs and specific purposes of work performed ● Vendor services or materials acquired under purchase orders or contracts	E, F, I		
54. Perform specific accounting using identified systems as the Finance/Administration Section Chief or AHJ requests.	E, F, I		
55. Capture insurance settlements and other credits, such as salvage credits and rebates, by incident.	E, F, I		

56. Document and describe nonproductive labor costs: ● Sick leave ● Vacation time	E, F, I		

3h. Behavior: Document incident costs

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
57. List damaged and destroyed equipment: ● Prepare detailed description of the damage and necessary repairs	E, F, I		
58. Prepare and maintain equipment usage records.	E, F, I		
59. Document authorizations that a department head, legislative authority or executive authority grant to perform work.	E, F, I		
60. Photograph pertinent sites before work begins, during incident response and after work completion.	E, F, I		
61. Prepare labor summaries backed up by detailed labor runs and time sheets.	E, F, I		
62. Log vendor purchase orders, invoices and payments and keep copies.	E, F, I		
63. Record contracts, invoices and payments for each contractor: ● Prepare explanation of contract execution and the procurement method ● Prepare explanation if price was not competitive	E, F, I		
64. File appropriate documentation: ● Correspondence with grantees ● Copies of law enforcement, fire and medical dispatch logs ● Final inspection reports	E, F, I		
65. Prepare incident cost summaries by operational period, as the Finance/Administration Section Chief directs.	E, F, I		

4. 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.

4a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
66. Prepare for and participate in briefings: ● Ensure briefings are accurate, timely and include appropriate personnel ● Brief external support organizations ● Share and evaluate information	E, F, I		
67. Lead staff briefings and debriefings.	E, F, I		

5. Competency: Prepare for demobilization/transfer

Description: Demobilize position and transfer position duties.

5a. Behavior: Transfer position duties while ensuring continuity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
68. Complete the process for demobilizing position responsibilities: ● Brief and provide complete and accurate records to relief personnel ● Discuss equipment release considerations ● Provide information to supervisor to assist with decisions on release priorities ● Coordinate with appropriate partners regarding demobilization procedures ● Brief personnel on demobilization responsibilities ● Ensure personnel demobilize in a timely and complete manner ● Emphasize safety and accountability during this phase of operations	C, E, F, I, J, T		
69. Coordinate an efficient transfer of position duties when deactivating or demobilizing resources: ● Inform assigned personnel ● Notify incoming personnel when and where transition of positions will occur ● Conduct transition effectively ● Document follow-up action and submit to agency representative	E, F, I		
70. Complete all necessary reports and narratives following common standards before turnover: ● Activity log ● Shift change ● End of operational period ● Reassignment ● Deactivation/demobilization	E, F, I		
71. Participate in transition or incident closeout: ● Conduct debriefings with agency administrator(s) as requested ● Close out incident as appropriate for the AHJ	E, F, I		

5b. Behavior: Plan for demobilization and ensure staff follow demobilization process

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
72. Participate in the development, approval and implementation of the demobilization plan: ● Coordinate with appropriate partners regarding demobilization procedures ● Coordinate needs and responsibilities	E, F, I		