



# FEMA

POSITION TASK BOOK FOR THE POSITION OF

## SHELTER MANAGER (TYPE 2)

Version: November 2021

Check the appropriate position type:

☐ Single Type    ☐ Type 1    ☐ Type 2    ☐ Type 3

<b>POSITION TASK BOOK ASSIGNED TO:</b>
TRAINEE'S NAME:
DUTY STATION:
PHONE NUMBER:
EMAIL:
<b>POSITION TASK BOOK INITIATED BY:</b>
OFFICIAL'S NAME:
TITLE:
DUTY STATION:
PHONE NUMBER:
EMAIL:
<b>POSITION TASK BOOK WAS INITIATED:</b>
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

<b>TRAINEE NAME:</b>
<b>TRAINEE POSITION:</b>
<b>Evaluation Record Number:</b>
<b>Evaluator's name:</b>
<b>Incident/office title and agency:</b>
<b>Evaluator's home jurisdiction address and phone:</b>
<b>Name and location of incident or simulation/exercise:</b>
<b>Incident kind:</b>
<b>Number and kind of resources:</b>
<b>Evaluation period:</b>
<b>Position type:</b>
<b>Recommendation:</b> 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.
<b>Additional recommendations/comments:</b>
<b>Date:</b>
<b>Evaluator's initials:</b>
<b>Evaluator's relevant qualification:</b>

## SHELTER MANAGER (TYPE 2)

### 1. Competency: Assume position responsibilities

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

#### 1a. Behavior: Successfully assume the role of Shelter Manager and initiate position activities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Arrive properly equipped at designated time and location. Check in according to agency/organization guidelines: <ul style="list-style-type: none"> <li>● Carry out check-in procedures and ensure assigned personnel do the same</li> <li>● Obtain and assemble all supplies, tools, and technology to perform the tasks of the position</li> </ul>	E, F, I		
2. Relay, support, and maintain operational rhythm: <ul style="list-style-type: none"> <li>● Prepare a shelter support plan, gathering information from all appropriate shelter personnel to determine support needs</li> <li>● Complete situation reports for the shelter related to the current operational phase</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Receive initial briefing from supervisor—one-on-one or in team meetings: <ul style="list-style-type: none"> <li>● Incident priorities, goals, and objectives</li> <li>● Initial instructions concerning shelter priorities</li> <li>● Expected time frames for briefings, planning meetings, and team meetings</li> <li>● Any limitations and constraints that affect operations and strategies</li> <li>● Review:               <ul style="list-style-type: none"> <li>○ Incident plans</li> <li>○ Shelter plan</li> <li>○ Current national situation</li> <li>○ Assigned resources and their status</li> <li>○ Established and operating facilities</li> <li>○ Anticipated incident duration, size, and type</li> <li>○ Shelter responsibilities and expectations</li> <li>○ Position responsibilities and expectations</li> </ul> </li> </ul>	E, F, I		
4. Collect information from outgoing Shelter Manager or other personnel responsible for the shelter: <ul style="list-style-type: none"> <li>● Information on incident relevant to the shelter's support activities</li> <li>● Information on the shelter's organizational structure</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>5.</b> Order necessary resources to achieve shelter objectives: <ul style="list-style-type: none"> <li>● Request additional personnel, supplies, services, and equipment within the established ordering processes</li> <li>● Request equipment, including items listed in the FEMA Commonly Used Sheltering Items &amp; Services Listing (CUSI-SL) or other shelter resource guide, as appropriate to the needs of the shelter residents</li> </ul>	E, F, I		
<b>6.</b> Coordinate with appropriate stakeholders the needs of shelter residents: <ul style="list-style-type: none"> <li>● Child care</li> <li>● Unaccompanied minors</li> <li>● Personal assistance services</li> <li>● Access and functional needs (AFN)</li> <li>● Health services</li> <li>● Mental health</li> <li>● Feeding</li> <li>● Translation/communication support</li> <li>● Service animal support and care</li> <li>● Pet care, if appropriate</li> <li>● Family reunification</li> </ul>	E, F, I		

**1d. Behavior: Establish effective relationships with relevant personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>7.</b> Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> <li>● Outgoing Shelter Manager or Shelter Management Team</li> <li>● Local agencies</li> <li>● Hosting unit</li> <li>● Policy group</li> <li>● Shelter operations and mass care</li> <li>● Public</li> <li>● Supporting agencies</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE



<p><b>8. Activate shelter:</b></p> <ul style="list-style-type: none"> <li>● Establish appropriate shelter areas and shelter organization, and assign staff responsibilities, while maintaining span of control. Activity areas may include: <ul style="list-style-type: none"> <li>○ Registration (manual, electronic, alternative access)</li> <li>○ Facility identification and signage</li> <li>○ Feeding</li> <li>○ Dormitory</li> <li>○ Health services</li> <li>○ Mental health and emotional support services</li> <li>○ Logistics</li> <li>○ Recreation</li> <li>○ Child care</li> <li>○ Household pet and service animal support, if applicable</li> <li>○ Ensure availability of appropriate resources</li> </ul> </li> <li>● Conduct supporting activities within operational period</li> <li>● Follow protocol for communicating daily accomplishments to the Documentation Unit or appropriate personnel</li> <li>● Establish operational rhythm and establish daily briefing/debriefing schedule with assigned personnel</li> <li>● Follow process for resource requests/releases for operational planning purposes</li> <li>● Assign staff, teams, or units, as appropriate</li> <li>● Participate in planning meetings to determine shelter organization, support tactical assignments, ensure resource support and coordination needs, and identify other considerations for the next operational period</li> </ul>			
<p><b>9. Supervise and adjust shelter organization and operations based on changes in incident situation and resource status:</b></p> <ul style="list-style-type: none"> <li>● Maintain shared situational picture throughout the shelter</li> <li>● Provide for functional and geographical supervision as necessary</li> <li>● Ensure effective use and coordination of all assigned resources</li> <li>● Constantly monitor objectives and overall shelter operations for efficacy and safety</li> </ul>	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: Ensure the health, safety, welfare, and accountability of assigned personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>10.</b> Ensure accountability of all personnel: <ul style="list-style-type: none"> <li>● Staff sign-in/sign-out process</li> <li>● Coordinate with assigned personnel to conduct personnel accountability checks</li> <li>● Validate accountability with supervisor</li> </ul>	E, F, I		
<b>11.</b> Ensure public health resources are in place, including hand sanitizer, cleaning and janitorial schedule, waste removal, and recycling.	E, F, I		

### 2b. Behavior: Establish work assignments and performance expectations, monitor performance, and provide feedback

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>12.</b> Prioritize work within the shelter	E, F, I		

### 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
<b>13.</b> Prepare for and participate in briefings with other branches, divisions/groups, units, and incident staff: <ul style="list-style-type: none"> <li>● Share and evaluate information with shelter staff</li> <li>● Identify safety hazards and mitigation strategies with the Safety Officer</li> <li>● Maintain situational awareness of all activities within the shelter, including:               <ul style="list-style-type: none"> <li>○ Health services</li> <li>○ Mental and emotional health services</li> <li>○ AFN support services</li> </ul> </li> <li>● Maintain quality updates for Public Information Officer (PIO)</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>14.</b> Ensure incident documentation and administrative requirements are complete <ul style="list-style-type: none"> <li>● Submit incident narrative to supervisor</li> <li>● Complete and submit activity log to Documentation Unit or appropriate personnel for each operational period</li> <li>● Ensure all personnel and equipment time records are complete and submitted at the end of each operational period</li> <li>● Ensure use and accuracy of logs and shelter reports, to include National Shelter System (NSS) and any other shelter-specific reporting tools or systems</li> <li>● Comply with documentation requirements of supporting agencies</li> </ul>	E, F, I		

#### 3c. Behavior: Communicate incident priorities and operations

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>15.</b> Update supervisor on current accomplishments or problems and complete incident forms as necessary: <ul style="list-style-type: none"> <li>● Comply with documentation requirements of supporting agencies</li> </ul>	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: Plan for demobilization and ensure staff follow procedures

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>16.</b> Assist in development, approval, and implementation of demobilization plan: <ul style="list-style-type: none"> <li>● Coordinate with supervisor during development and implementation</li> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Coordinate with casework and recovery planning teams</li> <li>● Coordinate shelter needs and responsibilities</li> <li>● Provide information to supervisor to assist with decisions on release priorities</li> </ul>	E, F, I		
<b>17.</b> Complete process for demobilizing shelter responsibilities: <ul style="list-style-type: none"> <li>● Reinforce emphasis on safety and accountability during this phase of the operations</li> <li>● Brief staff on demobilization responsibilities</li> <li>● Ensure all staff demobilize in a timely and complete manner</li> <li>● Brief replacement, if necessary</li> <li>● Ensure adequate shelter closing notice is posted and client housing needs are met</li> </ul>	E, F, I		
<b>18.</b> Ensure facility is clean and returned to preoccupancy condition: <ul style="list-style-type: none"> <li>● Facility and grounds are clean</li> <li>● Repair or replace (if lost or unrepairable) all equipment and supplies used during sheltering</li> </ul>	E, F, I		