



**FEMA**

POSITION TASK BOOK FOR THE POSITION OF

**ALL-HAZARDS NATIONAL INCIDENT  
MANAGEMENT SYSTEM (NIMS)  
FINANCE AND ADMINISTRATION SECTION  
CHIEF (TYPE 1)**

## FINANCE AND ADMINISTRATION SECTION CHIEF (TYPE 1)

### 1. Competency: Assume position responsibilities

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

#### 1a. Behavior: Obtain information relevant to position assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>1.</b> Obtain and review necessary documentation: <ul style="list-style-type: none"> <li>● Copy of Delegation of Authority, Letter of Expectation, Letter of Agreement or Memorandum of Understanding (MOU)</li> <li>● Applicable plans and reports</li> <li>● Directories: phone, notification</li> <li>● Written incident status summary</li> <li>● Authorizations: cell phones, rental vehicles, computers</li> </ul>	E, F, I		
<b>2.</b> Receive briefing from Incident Commander (IC) or outgoing Finance/Administration Section Chief: <ul style="list-style-type: none"> <li>● Meetings and briefings schedule</li> <li>● Situational assessment</li> <li>● Incident objectives</li> <li>● Strategy</li> <li>● Hazards to incident personnel and public</li> <li>● Agencies/jurisdictions involved</li> <li>● Organizational structure</li> <li>● Resources summary</li> <li>● Logistical needs</li> <li>● Ordering procedures</li> <li>● Incident priorities and status: life safety, incident stabilization, property and environment</li> <li>● Timing scheduling</li> <li>● Expected products</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>3.</b> Evaluate staffing needs required to manage the section <ul style="list-style-type: none"> <li>● Ensure consistency with National Incident Management System (NIMS) organizational structure</li> <li>● Identify training opportunities</li> <li>● Ensure use of established procedures for ordering resources</li> <li>● Request appropriate technical specialists to assist with special incident conditions</li> </ul>	E, F, I		
<b>4.</b> Utilize section personnel: <ul style="list-style-type: none"> <li>● Establish appropriate organization and assign roles and responsibilities, while maintaining span of control</li> </ul>	E, F, I		

<p>5. Work closely with Operations Section personnel to identify kind, type and number of resources required to achieve section objectives:</p> <ul style="list-style-type: none"> <li>● Consider incident type and complexity, kinds and types of resources, resource availability and health and safety factors</li> <li>● Consider long-range and contingency plans and identify potential future resources</li> </ul>	E, F, I		
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**1c. Behavior: Ensure readiness for assignment**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>6. Arrive properly equipped at designated time and location and check in according to agency/organization guidelines:</p> <ul style="list-style-type: none"> <li>● Arrive with go-kit and any additional equipment</li> <li>● Carry out check-in procedures and ensure assigned personnel do the same</li> </ul>	E, F, I		
<p>7. Obtain complete incident and logistical information:</p> <ul style="list-style-type: none"> <li>● Incident name, number, anticipated duration, size, type, responsibilities and expectations</li> <li>● Reporting time and location</li> <li>● Transportation arrangements and travel routes</li> <li>● Contact procedures during travel (telephone/radio)</li> <li>● Expected working conditions</li> <li>● Personal Protective Equipment (PPE)</li> <li>● Security measures</li> <li>● Updated contact information and information links</li> </ul>	E, F, I		
<p>8. Obtain, assemble and prepare information and materials for go-kit. The kit should contain critical items for the assignment and be easily transportable:</p> <ul style="list-style-type: none"> <li>● Supplies: <ul style="list-style-type: none"> <li>○ Office supplies appropriate to the function</li> <li>○ Authority Having Jurisdiction (AHJ) identification</li> </ul> </li> <li>● badge and qualification card</li> <li>● Reference materials: <ul style="list-style-type: none"> <li>○ Functional guidelines relative to incident type (agency guidance or other functional guidelines)</li> <li>○ AHJ operations guides or other operational guides</li> <li>○ Position manuals</li> </ul> </li> <li>● Forms: <ul style="list-style-type: none"> <li>○ Agency-specific forms appropriate to the function</li> </ul> </li> </ul>	E, F, I		

## 2. 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

### 2a. Behavior: Ensure the exchange of relevant information during briefings

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>9.</b> Communicate options, considerations and recommendations during briefings, including pertinent financial information that may affect the team's management of the incident: <ul style="list-style-type: none"> <li>● Cost constraints</li> <li>● Cost-sharing agreements</li> <li>● Land-use agreements</li> <li>● Cost-benefit comparison matrices</li> <li>● Cost estimates and projections</li> </ul>	E, F, I		
<b>10.</b> Lead staff briefings and debriefings.	E, F, I		
<b>11.</b> Prepare for and participate in briefings: <ul style="list-style-type: none"> <li>● Ensure briefings are accurate, timely and include appropriate personnel</li> <li>● Brief external support organizations</li> <li>● Share and evaluate information</li> </ul>	E, F, I		

### 3. Competency: Lead assigned personnel

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

#### 3a. Behavior: Model leadership values and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>12.</b> Create a positive work environment: <ul style="list-style-type: none"> <li>● Communicate leader's intent and guidance</li> <li>● Manage section and its activities effectively</li> <li>● Proactively assume responsibility for the section and initiate action</li> </ul>	E, F, I		
<b>13.</b> Establish and maintain positive interpersonal and interagency working relationships: <ul style="list-style-type: none"> <li>● Understand scope, roles, responsibilities, jurisdiction and authority of responding agencies</li> </ul>	E, F, I		
<b>14.</b> Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
<b>15.</b> Understand and comply with NIMS/Incident Command System (ICS) concepts and principles: <ul style="list-style-type: none"> <li>● Establish and modify an effective organization based on changing incident and resource conditions</li> <li>● Maintain appropriate span of control</li> <li>● Act as a representative of incident leadership</li> </ul>	E, F, I		

#### 3b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>16.</b> Communicate with assigned personnel: <ul style="list-style-type: none"> <li>● Communicate priorities, objectives, strategies and any changes</li> <li>● Inform personnel of their assigned tasks and expectations</li> <li>● Clearly explain conflict resolution procedures and ensure that personnel understand</li> <li>● Ensure that assigned objectives and expectations for the operational period are reasonable and accurate</li> </ul>	E, F, I		
<b>17.</b> Ensure debriefings occur and participate as necessary <ul style="list-style-type: none"> <li>● Ensure incident situation status information is current and complete</li> </ul>	E, F, I		
<b>18.</b> Ensure that staff follows all applicable agency/jurisdiction policies, contracts, standard operating procedures and agreements: <ul style="list-style-type: none"> <li>● Federal, state, local, tribal, territorial and regional relationships, as appropriate</li> <li>● Roles and responsibilities of potential responder agencies</li> <li>● Scope, jurisdiction and authority of potential responder agencies' contingency plans</li> </ul>	E, F, I		

<p><b>19.</b> Supervise and hold personnel accountable for executing assigned tasks:</p> <ul style="list-style-type: none"> <li>● Identify and promptly resolve disagreements, issues and misunderstandings</li> <li>● Prioritize work while considering immediate support for incident operations</li> </ul>	E, F, I		
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**3c. Behavior: Ensure the health, safety, welfare and accountability of assigned personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>20.</b> Demonstrate knowledge of and comply with relevant health and safety requirements:</p> <ul style="list-style-type: none"> <li>● Direct and oversee section operations to ensure compliance with health and safety considerations and guidelines</li> <li>● Coordinate with the Safety Officer to ensure that assigned personnel follow safety guidelines</li> </ul>	E, F, I		
<p><b>21.</b> Evaluate mental and physical fatigue of assigned personnel</p> <ul style="list-style-type: none"> <li>● Ensure adequate rest is provided to section personnel</li> </ul>	E, F, I		
<p><b>22.</b> Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk:</p> <ul style="list-style-type: none"> <li>● Adjust operations in response to hazards, weather and other relevant events</li> </ul>	E, F, I		
<p><b>23.</b> 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:</p> <ul style="list-style-type: none"> <li>● 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)</li> <li>● Ensure the protection of Personally Identifiable Information (PII) while reporting</li> <li>● Obtain information from the following sources regarding special hazards, threats or unexpected occurrences: subordinates, personal observation, other incident personnel and off-incident personnel</li> </ul>	E, F, I		

**3d. Behavior: Identify opportunities and meet requirements to provide equal access and reasonable accommodation in all activities**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>24.</b> Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.</p>	E, F, I, J		
<p><b>25.</b> Demonstrate the ability to identify opportunities for universal accessibility</p>	E, F, I, J		
<p><b>26.</b> Provide equal access, disability accommodations and access and functional needs (AFN) accommodations</p>	E, F, I, J		

#### 4. 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.

##### 4a. Behavior: Set the section priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
27. Analyze work assignments and staffing levels to ensure achievement of section objectives.	E, F, I		
28. Attend and participate in strategy meetings as necessary: <ul style="list-style-type: none"> <li>● Assess organizational needs</li> <li>● Identify additional resource needs</li> <li>● Identify critical factors to ensure section success</li> <li>● Prioritize incident and section objectives</li> </ul>	E, F, I		
29. Disseminate priorities and expected completion timelines to staff.	E, F, I		
30. Hold staff accountable for communicated priorities and deadlines.	E, F, I		

##### 4b. Behavior: Develop and implement plans

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
31. Approve completed plans: <ul style="list-style-type: none"> <li>● Ensure plans are complete, accurate, realistically attainable and relevant to the incident objectives</li> </ul>	E, F, I		
32. Participate in the planning process: <ul style="list-style-type: none"> <li>● Prepare for and participate in planning meetings</li> <li>● Assist in the development of plans, as necessary:               <ul style="list-style-type: none"> <li>○ Long-range</li> <li>○ Strategic</li> <li>○ Contingency</li> <li>○ Demobilization</li> <li>○ Continuity of Operations Plan (COOP)</li> </ul> </li> </ul>	E, F, I		
33. Review, validate and modify plans: <ul style="list-style-type: none"> <li>● Analyze alternate strategies and explain decisions</li> <li>● Validate or revise section objectives</li> <li>● Review information covering health and safety principles, known hazards and importance of all periods</li> <li>● Validate section organizational structure</li> <li>● Validate section resource assignments</li> <li>● Review reserve resources</li> <li>● Evaluate immediate support needs</li> </ul>	E, F, I		

##### 4c. Behavior: Coordinate with all appropriate personnel and stakeholders

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

34. Establish effective relationships and coordinate with incident personnel: <ul style="list-style-type: none"> <li>● IMT personnel</li> <li>● Other supporting personnel</li> </ul>	E, F, I		
35. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		
36. Foster working relationships between Logistics Section and Finance/Administration Section	E, F, I		
37. Provide financial summary information on current incident operations to host agency representative, Command and General Staff and emergency operations center (EOC) staff	E, F, I		

**4d. Behavior: Apply agency policy, contracts and agreements**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
38. Complete all work according to organization/agency direction, policy and incident objectives: <ul style="list-style-type: none"> <li>● Ensure that personnel complete all documentation requirements according to organization/agency direction, policy and incident objectives</li> </ul>	E, F, I		
39. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		

**4e. Behavior: Make appropriate decisions based on evaluation of gathered information, risks and incident situation and use information to produce outputs and modify approach**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
40. Evaluate special conditions, existing or predicted, that require technical expertise, including: <ul style="list-style-type: none"> <li>● Hazards</li> <li>● Reconnaissance</li> <li>● Objectives</li> <li>● Access/egress</li> <li>● Values to be protected</li> <li>● Evacuation/sheltering potential</li> <li>● Communications</li> <li>● Organizational structure</li> <li>● Tactical coordination</li> <li>● Weather and topography</li> <li>● Responder fatigue</li> <li>● Logistical considerations</li> <li>● Jurisdictional responsibilities</li> <li>● Span of control</li> </ul>	E, F, I		

**4f. Behavior: Ensure documentation is complete**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE



<p><b>41.</b> Assemble components of final incident finance packages and transfer documentation to the responsible agency or person:</p> <ul style="list-style-type: none"> <li>● Pay documents</li> <li>● Injury reports</li> <li>● Procurement documents</li> <li>● Property damage reports</li> <li>● Claim documents</li> </ul>	E, F, I		
<p><b>42.</b> Ensure that all personnel and equipment time records are complete and that staff submit required documentation to the Time Unit Leader or equipment time recorder at the end of each operational period:</p> <ul style="list-style-type: none"> <li>● Pay documents</li> <li>● Injury reports</li> <li>● Procurement documents</li> <li>● Property damage reports</li> <li>● Claim documents</li> <li>● Sign-in/sign-out sheets</li> <li>● Time sheet</li> </ul>	E, F, I		
<p><b>43.</b> Ensure the protection of PII.</p>	E, F, I		
<p><b>44.</b> Maintain and collect personal records related to incident:</p> <ul style="list-style-type: none"> <li>● Time sheets</li> <li>● Rental records</li> <li>● Accident forms</li> <li>● Property records</li> <li>● Equipment time records</li> <li>● Receipts</li> </ul>	E, F, I		
<p><b>45.</b> Maintain and submit incident records for events, personnel, equipment, supplies and other data for incident management needs:</p> <ul style="list-style-type: none"> <li>● Property loss/damage reports</li> <li>● Agency-required incident reports</li> <li>● Activity log</li> <li>● Changes in strategy and tactics</li> </ul>	E, F, I		
<p><b>46.</b> Receive and transmit current and accurate information:</p> <ul style="list-style-type: none"> <li>● Claims and potential claims</li> <li>● Injury information</li> <li>● Work/rest guidelines</li> <li>● Compensation issues</li> <li>● Overtime policies and authorizations</li> <li>● Procurement</li> <li>● Costs</li> <li>● Personnel and resource time accounting (burn rates)</li> </ul>	E, F, I		
<p><b>47.</b> Review documents for accuracy, timeliness and appropriate distribution.</p>	E, F, I		

**4g. Behavior: Establish work assignments and performance expectations, monitor performance and provide feedback**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
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<p><b>48.</b> Supervise or ensure completion of the duties of a Compensation and Claims Unit Leader:</p> <ul style="list-style-type: none"> <li>● Determine the need for compensation for injury and claims specialists and order personnel as needed</li> <li>● Review the medical plan</li> <li>● Review and coordinate procedures for handling claims</li> <li>● Brief the claims specialists on incident activity</li> <li>● Ensure that all compensation for injury and claims logs and forms are complete and routed to the appropriate agency for post-incident processing prior to demobilization</li> </ul>	E, F, I		
<p><b>49.</b> Supervise or ensure completion of the duties of a Procurement Unit Leader:</p> <ul style="list-style-type: none"> <li>● Obtain the incident procurement plan</li> <li>● Prepare and authorize contracts, building and land-use agreements</li> <li>● Draft Memorandums of Understanding</li> <li>● Establish contracts and agreements with supply vendors</li> <li>● Ensure that a system is in place that meets agency property management requirements</li> <li>● Ensure proper accounting for all new property</li> <li>● Ensure all procurement logs and forms are completed according to policy</li> <li>● Interpret contracts and agreements; resolve disputes within delegated authority</li> <li>● Complete final processing of contracts and claims and send documents for payment</li> </ul>			
<p><b>50.</b> Supervise or ensure completion of the duties of a Cost Unit Leader:</p> <ul style="list-style-type: none"> <li>● Coordinate with agency headquarters on cost reporting procedures</li> <li>● Collect and record all cost data</li> <li>● Develop incident/event cost summaries</li> <li>● Prepare resources cost estimates for the Planning Section</li> <li>● Ensure accurate preparation of all cost documents</li> <li>● Maintain cumulative incident/event cost records</li> </ul>	E, F, I		
<p><b>51.</b> Supervise or ensure completion of the duties of a Time Unit Leader:</p> <ul style="list-style-type: none"> <li>● Determine incident requirements for time recording function</li> <li>● Ensure that daily personnel time recording and equipment time recording documents are prepared and in compliance with agency policy</li> <li>● Maintain separate logs for overtime hours</li> <li>● Maintain records security</li> <li>● Ensure that all records are current and complete prior to demobilization</li> <li>● Obtain the demobilization plan and ensure that all equipment and personnel time recorders are adequately briefed on the demobilization plan</li> <li>● Release time reports from assisting agency personnel to the respective agency representatives prior to demobilization</li> </ul>	E, F, I		

**4h. Behavior: Oversee and support the actions of Finance/Administration Section units**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
52. Demonstrate finance system proficiency	E, F, I		

53. Describe and follow relevant accounting rules and procurement protocols	E, F, I		
54. Ensure that a process is in place for checking and reporting injuries and claims.	E, F, I		
55. Ensure that staff obtain and record all cost data.	E, F, I		
56. Evaluate and share pertinent information that may affect incident support staff <ul style="list-style-type: none"> <li>• Potential and existing problems, especially in areas of injury compensation, pay, claims and procurement</li> </ul>	E, F, I		
57. Review and analyze finance data personally to ensure that spending is within limits and meets contractual obligations.	E, F, I		
58. Review contracts, MOUs and cooperative agreements to ascertain their impact and application.	E, F, I		
59. Track and monitor time and cost data submitted to the Time Unit Leader and the Logistics Section.	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
<b>60.</b> Complete all necessary reports and narratives following common standards before turnover <ul style="list-style-type: none"> <li>● Activity log</li> <li>● Shift change</li> <li>● End of operational period</li> <li>● Reassignment</li> <li>● Deactivation/demobilization</li> </ul>	E, F, I		
<b>61.</b> Complete the process for demobilizing position responsibilities <ul style="list-style-type: none"> <li>● Brief and provide complete and accurate records to relief personnel</li> <li>● Discuss equipment release considerations</li> <li>● Provide information to supervisor to assist with decisions on release priorities</li> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Brief personnel on demobilization responsibilities</li> <li>● Ensure personnel demobilize in a timely and complete manner</li> <li>● Emphasize safety and accountability during this phase of operations</li> </ul>	C, E, F, I, J, T		
<b>62.</b> Coordinate an efficient transfer of position duties when deactivating or demobilizing resources <ul style="list-style-type: none"> <li>● Inform assigned personnel</li> <li>● Notify incoming personnel when and where transition of positions will occur</li> <li>● Conduct transition effectively</li> <li>● Document follow-up action and submit to agency representative</li> </ul>	E, F, I		
<b>63.</b> Participate in transition or incident closeout <ul style="list-style-type: none"> <li>● Conduct debriefings with agency administrator(s) as requested</li> <li>● Close out incident as appropriate for the AHJ</li> </ul>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>64.</b> Participate in the development, approval and implementation of demobilization plan: <ul style="list-style-type: none"> <li>● Coordinate with appropriate partners regarding demobilization procedures</li> <li>● Coordinate needs and responsibilities</li> </ul>	E, F, I		