



# ARIZONA QUALIFICATION SYSTEM

## EOC / ICS ALL HAZARDS POSITION TASK BOOK FOR THE POSITION OF FINANCE/ADMINISTRATION

### SECTION CHIEF

Version 2

Check the appropriate position type:

Type 1

Type 2

Type 3

<b>POSITION TASK BOOK ASSIGNED TO:</b>
CANDIDATE'S NAME:
DUTY STATION:
PHONE NUMBER:
EMAIL:
<b>POSITION TASK BOOK INITIATED BY:</b>
OFFICIAL'S NAME and SIGNATURE:
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 candidate for **all-hazards certification**.)

<b>FINAL EVALUATOR VERIFICATION</b>	
I verify that _____ has successfully completed all tasks as a candidate 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

<b>DOCUMENTATION OF AGENCY CERTIFICATION BY THE AHJs CERTIFYING OFFICER</b>	
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 adhering to NIMS NQS EOC Skill Sets 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 candidate must meet to be certified for a position within the Arizona Qualification System (AQS). The performance criteria completely follows the core NIMS NQS EOC Skill Sets and PTB competencies, behaviors and tasks. This PTB covers relevant positions within all 3 EOC structures (ICS-Like, Incident Support Model, and Departmental Structure).

**A candidate may not work on multiple position type PTBs for a specific position at the same time; for example, a candidate 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 candidate 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 candidate'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 candidate'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 candidate'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 candidate.
- The final evaluator is a leader who verifies that a candidate has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the candidate 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, it is forwarded to the Quality Control Officer (QCO) at DEMA along with supporting evidence that the candidate has completed all position requirements. The QCO will put the PTB and all sent documents on the QRB calendar. The QRB review will make it's recommendation to the AHJs CO. The CO in all cases will make the final determination for certification.
- After the QRB review, the AHJ Certifying Officer completes the Documentation of Agency Certification form as appropriate. That form is sent to the QCO who will issue an Arizona Gold Card credential for that individual. The Gold Card will only be issued if the the QRB gave a positive recommendation.

## ***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 will establish their requirements for this, usually on a case by case basis. Each AHJ establishes the requirements for transferring qualifications from another AHJ.
- If an AHJ chooses not to accept a candidate's existing certification of qualification, the candidate may be reevaluated in the specific position and issued a new PTB.
- An individual may hold multiple qualifications, such as Final Evaluator, and also hold one or more PTB credentials.
- In all cases, to receive a Gold Card, an AQS PTB will be completed by the individual and forwarded through the AHJ's CO to the QCO to be put on the schedule for a review by the QRB.

## **Training Requirements**

### **Mandatory Classes:**

The following SHOULD be completed before initiation of a Position Task Book:

IS-100: Introduction to the Incident Command System (ICS)  
IS-200: Basic Incident Command System for Initial Response  
IS-700: NIMS: An Introduction  
IS-800: National Response Framework: An Introduction  
IS-2200: Basic Emergency Operations Center Functions

### **Foundational Classes:**

Foundational Classes are a requirement for certification and credentialing. Foundational classes can be completed simultaneously while working through your PTB. Below are the required Foundational Classes:

ICS-300: Intermediate Incident Command System  
ICS-400: Advanced Incident Command System  
G-191: ICS/ Emergency Operations Center Interface  
G-2300: Intermediate Emergency Operations Center Functions  
O-0305 United States Fire Administration (USFA) Type3 All-Hazards Incident Management Team (AHIMT) Intro  
E/L 0973 National Incident Management System Incident Command System All-Hazards Finance / Administration Section Chief

**ALL OF THE ABOVE CLASSES NEED TO BE COMPLETED WITH EVIDENCE FOR THE QRB**

**Attention: Reference the Resource Typing Definition for a thorough understanding of your PTB requirements at: <https://www.fema.gov/emergency-managers/nims/components/positions>**

## Evaluator Verification

<b>ANNUAL EVALUATOR VERIFICATION To verify ongoing activity towards PTB completion</b>	
Start Date : _____	Evaluator: _____
First Year : _____	Evaluator: _____
Second Year: _____	Evaluator: _____
Third Year: _____	Evaluator: _____
Fourth Year: _____	Evaluator: _____
Fifth Year: _____	Evaluator: _____

\*This Position Task Book has a currency requirement of 5 Years after the date of credentialing.

<b>Arizona Qualification System American Disabilities Act (ADA) Compliance</b>
<p>The Americans with Disabilities Act (ADA) and Americans with Disabilities Amendment Act (ADAA) Compliance: _____</p> <p>The Department of Emergency and Military Affairs (DEMA) Arizona Qualification System (AQS) establishes guidance and tools to assist state, local, and tribal Authority Having Jurisdiction (AHJ) in developing qualified, certified, and credentialed deployable personnel.</p> <p>Qualified individuals seeking reasonable accommodations for tasking and deployment must contact their employing AHJ. State, local, and tribal AHJ providing qualified individuals for tasking and deployments are solely responsible for processing reasonable accommodation requests in accordance with the ADA/ADAA and applicable AHJ's policies and procedures, before and during tasking and deployments.</p>

## 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. Candidates 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 candidate can perform tasks related to the position. If a task has multiple codes listed, it means the evaluator can assess the candidate on any of those circumstances as opposed to evaluating the candidate 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.

## 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. Also, there are four blank Evaluation Record Forms at the back of this PTB.

### 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 candidate 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 job function:** Identify the name (if applicable) and location where the candidate 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 candidate's PTB.

**Evaluation period:** Enter inclusive dates of candidate 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 candidate's future development needs.

**Additional recommendations/comments:** Provide additional recommendations and comments about candidate, 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 candidate position you supervised.

## Evaluation Record Form

<b>CANDIDATE NAME:</b>
<b>CANDIDATE 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 or job function:</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 candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development: <input type="checkbox"/> The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. <input type="checkbox"/> The candidate 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 candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.
<b>Additional recommendations/comments:</b>
<b>Date:</b>
<b>Evaluator's initials:</b>
<b>Evaluator's relevant qualification:</b>



## Finance/Administration Section Chief

### 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: Ensure readiness for assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>1. 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 badge and qualification card</li> </ul> </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		
<p>2. 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>3. 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		

**1b. Behavior: Obtain information relevant to position assignment**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>4. Receive briefing from Incident Commander (IC) or outgoing Finance/Administration Section Chief:</p> <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		
<p>5. Obtain and review necessary documentation:</p> <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		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>6. Evaluate staffing needs required to manage the section:</p> <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		
<p>7. Utilize section personnel:</p> <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		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>8.</b> 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		

## 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
<b>9.</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		
<b>10.</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>11.</b> Exhibit principles of duty, respect and integrity as a leader.	C, E, F, I, J, T		
<b>12.</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		

### 2b. Behavior: Communicate incident priorities and supervise personnel

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>13.</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>14.</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		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>15.</b> Supervise and hold personnel accountable for executing assigned tasks: <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		
<b>16.</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		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>17.</b> Evaluate mental and physical fatigue of assigned personnel. <ul style="list-style-type: none"> <li>Ensure adequate rest is provided to section personnel</li> </ul>	E, F, I		
<b>18.</b> Recognize potentially hazardous situations, inform assigned personnel of hazards and take precautions to mitigate risk: <ul style="list-style-type: none"> <li>Adjust operations in response to hazards, weather and other relevant events</li> </ul>	E, F, I		
<b>19.</b> Demonstrate knowledge of and comply with relevant health and safety requirements: <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		
<b>20.</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: <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		

**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
21. Demonstrate the ability to identify opportunities for universal accessibility.	E, F, I, J		
22. Demonstrate the ability to assess and monitor for physical access, programmatic access and effective communications access.	E, F, I, J		
23. 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 section priorities

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
24. 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		
25. Disseminate priorities and expected completion timelines to staff.	E, F, I		
26. Analyze work assignments and staffing levels to ensure achievement of section objectives.	E, F, I		
27. 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
28. 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		
29. 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		
30. 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		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
31. Establish effective relationships with stakeholders and partners in the impacted jurisdiction(s).	E, F, I		
32. 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		
33. Foster working relationships between Logistics Section and Finance/Administration Section.	E, F, I		
34. 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		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
35. Demonstrate knowledge of and apply relevant legal, regulatory and fiscal constraints.	E, F, I		
36. 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		



**3e. 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
<p><b>37.</b> Evaluate special conditions, existing or predicted, that require technical expertise, including:</p> <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		

**3f. Behavior: Ensure documentation is complete**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>38.</b> Review documents for accuracy, timeliness and appropriate distribution.</p>	E, F, I		
<p><b>39.</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>40.</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		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>41.</b> Receive and transmit current and accurate information: <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		
<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: <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 sheets</li> </ul>	E, F, I		
<b>43.</b> Assemble components of final incident finance packages and transfer documentation to the responsible agency or person: <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		
<b>44.</b> Ensure the protection of PII.	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>45.</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		
<p><b>46.</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>	E, F, I		
<p><b>47.</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		

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>48.</b> Supervise or ensure completion of the duties of a Cost Unit Leader: <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		

**3h. Behavior: Oversee and support the actions of Finance/Administration Section units**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>49.</b> Describe and follow relevant accounting rules and procurement protocols.	E, F, I		
<b>50.</b> Demonstrate finance system proficiency.	E, F, I		
<b>51.</b> Ensure that staff obtain and record all cost data.	E, F, I		
<b>52.</b> Review and analyze finance data personally to ensure that spending is within limits and meets contractual obligations.	E, F, I		
<b>53.</b> Ensure that a process is in place for checking and reporting injuries and claims.	E, F, I		
<b>54.</b> 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		
<b>55.</b> Track and monitor time and cost data submitted to the Time Unit Leader and the Logistics Section.	E, F, I		
<b>56.</b> Review contracts, MOUs and cooperative agreements to ascertain their impact and application.	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
<p><b>57.</b> Prepare for and participate in briefings:</p> <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		
<p><b>58.</b> Lead staff briefings and debriefings.</p>	E, F, I		
<p><b>59.</b> Communicate options, considerations and recommendations during briefings, including pertinent financial information that may affect the team's management of the incident:</p> <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		

## 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
<p><b>60.</b> Complete the process for demobilizing position responsibilities:</p> <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		
<p><b>61.</b> Coordinate an efficient transfer of position duties when deactivating or demobilizing resources:</p> <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		
<p><b>62.</b> Complete all necessary reports and narratives following common standards before turnover:</p> <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		
<p><b>63.</b> Participate in transition or incident closeout:</p> <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**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<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		

## **Emergency Operations Center Skillsets**

Emergency Operations Center Skillsets have many tasks that are interchangeable with the tasks on the previous pages. Duplicated tasks have been grayed out. All remaining tasks must be completed.

Duplicated tasks are kept in this PTB as evidence supporting the collaboration and alignment with the FEMA EOC Skillsets. These requirements have been met through the completion of previous tasks within this PTB.

**NOTE:**

Grayed out tasks are marked in the Evaluator Record # and Initials/Date Column.



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## Emergency Operations Center (EOC) Skillset: Action Tracking

### Task Categories:

Perform action tracking

#### *Task Category: Perform action tracking*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Collect and track open tasks, issues and action items through resolution.	E, F, I		
2. Communicate about tasks, issues, and action items horizontally and vertically as necessary to create awareness and ensure completion.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Coordination and Individual Contribution

### Task Categories:

Complete common coordination and accountability tasks associated with all positions within the EOC

**Task Category: Complete common coordination and accountability tasks associated with all positions within the EOC**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: <ul style="list-style-type: none"> <li>Demonstrate general awareness of local risks and hazards</li> </ul>	C, E, F, I, T	Option: Code C IS-2200	
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J,		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T	Option: Code C G-2300	
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: <ul style="list-style-type: none"> <li>Demonstrate knowledge of information management systems, such as incident management software</li> </ul>	E, F, I,		
9. Manage essential elements of information and critical information requests in accordance with processes and procedures: <ul style="list-style-type: none"> <li>Follow EOC approval authorities</li> <li>Properly handle Personally Identifiable Information (PII) and sensitive information</li> <li>Provide proper documentation for record-keeping and accountability</li> <li>Provide information for reports and leadership decisions</li> </ul>	E, F, I,		
10. Practice proper knowledge management processes and procedures: <ul style="list-style-type: none"> <li>File structures</li> <li>Naming conventions</li> <li>Archiving processes</li> <li>Position logs</li> </ul>	E, F, I		
11. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.	E, F, I		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Participate in orderly transition of resources and processes from response to recovery.	E, F, I		
13. Transfer responsibilities upon completion of assignment: <ul style="list-style-type: none"> <li>• Transfer to replacement, recovery personnel, or other responsible party</li> <li>• If necessary, shift responsibilities to a non-disaster/day-to-day job</li> </ul>	E, F, I		
14. Participate in EOC training and exercises.	E, F		
15. Participate in after action review and improvement planning.	E, F, I, T		

## Emergency Operations Center (EOC) Skillset: Document and Records Management

**Task Categories:**

Collect and store documents and records

Provide documents and records upon request

**Task Category: Collect and store documents and records**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Follow document and records management procedures and policies.	E, F, I		
2. Brief EOC personnel on document management processes and related staff responsibilities.	E, F, I		
3. Monitor, review, and assess activity logs, charts, and records for completeness and follow up on any that are incomplete.	E, F, I		
4. Collect and package information for after action review.	E, F, I		

**Task Category: Provide documents and records upon request**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Monitor compliance with jpf information management processes and procedures.	E, F, I		
6. Perform real-time documentation collection and storage.	E, F, I		
7. Archive documents such as activity logs, charts, and records.	E, F, I		
8. Respond to internal requests for archived information, such as: <ul style="list-style-type: none"> <li>• Lessons learned from past disasters, incidents, and events</li> <li>• Previous incident information</li> </ul>	E, F, I		

## Emergency Operations Center (EOC) Skillset: Finance

**Task Categories:**

Administer financial management for jurisdictional expenditures

Advise EOC leadership and staff on financial matters associated with jurisdictional activities

**Task Category: Administer financial management for jurisdictional expenditures**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>1.</b> Demonstrate knowledge of jurisdictional/organizational procurement policies: <ul style="list-style-type: none"> <li>• Standard operations</li> <li>• Emergency operations</li> <li>• Cost-tracking processes and requirements:               <ul style="list-style-type: none"> <li>○ Preapproved vendors</li> <li>○ On-call contracts</li> </ul> </li> </ul>	E, F, I, J		
<b>2.</b> Demonstrate awareness of fiscal implications and requirements when: <ul style="list-style-type: none"> <li>• Requesting or activating resources</li> <li>• Operating under various types of emergency or disaster declarations</li> <li>• Receiving external, Federal, or state assistance</li> <li>• Using volunteer resources</li> </ul>	E, F, I, J, T		
<b>3.</b> Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
<b>4.</b> Seek information on the financial requirements of incoming resources, such as: <ul style="list-style-type: none"> <li>• National Guard assets</li> <li>• Mutual aid resources</li> </ul>	E, F, I		
<b>5.</b> Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
<b>6.</b> Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>7.</b> Collect, track, and document data related to funding and expenses: <ul style="list-style-type: none"> <li>• Monitor compensation processes for time and pay</li> <li>• Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims</li> <li>• Implement plan to coordinate and manage monetary donations</li> <li>• Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests</li> <li>• Identify and follow any use limitations for various funding sources</li> <li>• Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists</li> <li>• Identify and organize data relevant to grant or reimbursement applications</li> </ul>	E, F, I, J		
<b>8.</b> Coordinate with organizational representatives to identify additional discipline-specific funding sources.	E, F, I, J		
<b>9.</b> Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources: <ul style="list-style-type: none"> <li>• Track jurisdictional burn rate</li> </ul>	E, F, I		

**Task Category: Advise EOC leadership and staff on financial matters associated with jurisdictional activities**

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>10.</b> Review resource requests with resource management personnel to verify understanding of request and provide input on course of action: <ul style="list-style-type: none"> <li>• Suggest cost-efficient alternatives to obtaining requested resources, as appropriate</li> </ul>	E, F, I		
<b>11.</b> Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.	E, F, I		
<b>12.</b> Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.	E, F, I		
<b>13.</b> Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Legal Counseling

**Task Categories:**

Advise EOC leadership and staff on legal matters and provide other legal services

***Task Category: Advise EOC leadership and staff on legal matters and provide other legal services***

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of relevant laws, ordinances, regulations, authorities, and policies at local, state, tribal, territorial, and Federal levels.	E, F, I, J		
2. Demonstrate knowledge of local, state, tribal, territorial, and Federal procurement laws and procedures.	E, F, I, J		
3. Demonstrate knowledge of mutual aid agreements, Memorandums of Understanding (MOU), and Memorandums of Agreement (MOA).	E, F, I, J		
4. Brief or inform EOC personnel about legal advice available to guide EOC activities.	E, F, I		
5. Provide or arrange for legal advice relating to EOC activities.	E, F, I		
6. Provide guidance to senior leadership, Policy Group, and EOC personnel on potential legal risks and liabilities: <ul style="list-style-type: none"> <li>• Establish working relationships, including with external legal partners and subject matter experts</li> <li>• Anticipate potential legal problems and facilitate their resolution</li> </ul>	E, F, I		
7. Coordinate with local, state, tribal, territorial, and Federal emergency management attorneys.	E, F, I, J		
8. Draft proclamations, declarations, emergency ordinances, and other legal documents in coordination with EOC leadership and local, state, tribal, territorial, and Federal officials.	E, F, I, J		

## Emergency Operations Center (EOC) Skillset: Organizational Representation

### Task Categories:

Represent your organization and support EOC activities  
 Understand discipline-specific resource streams

#### *Task Category: Represent your organization and support EOC activities*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate subject matter expertise related to the organization you represent.	E, F, I, J, T		
2. Demonstrate understanding of your organization's policies, plans, resources, and constraints.	E, F, I, J, T		
3. Demonstrate ability to reach back to your organization and commit resources.	E, F, I		
4. Evaluate and monitor the situation and advise supervisor and other appropriate personnel: <ul style="list-style-type: none"> <li>• Identify problems and recommend solutions</li> <li>• Provide essential elements of information to those serving in a situational awareness function</li> <li>• Provide information to represented organization and third parties</li> <li>• Demonstrate ability to forecast resource needs, potential consequences, and cascading effects of action or inaction</li> </ul>	E, F, I		
5. Proactively coordinate with other organizational representatives on issues such as: <ul style="list-style-type: none"> <li>• Shared resources</li> <li>• Cascading effects on organizations</li> <li>• Efficiency of assistance</li> <li>• Resource availability</li> </ul>	E, F, I, T		
6. Brief relevant audiences on represented organization's issues related to the incident.	E, F, I		
7. Represent the organization in the planning process.	E, F, I		
8. Communicate back to your organization to share situational awareness.	E, F, I		

#### *Task Category: Understand discipline-specific resource streams*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
9. Track organizational resources, associated costs, and logistical concerns.	E, F, I		
10. Follow the EOC's process for providing your organization's resources.	E, F, I		



TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>11.</b> Initiate resource requests on behalf of your organization: <ul style="list-style-type: none"> <li>• Understand organizational Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), existing contracts, and discipline-specific state and Federal support</li> </ul>	E, F, I		

## Emergency Operations Center (EOC) Skillset: Leadership

**Task Categories:**

Be proficient in the job, both technically and as a leader

Supervise staff to ensure understanding and accomplishment of duties and tasks

Coordinate to foster unity of effort

**Task Category: Be proficient in the job, both technically and as a leader**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>1.</b> Exhibit principles of duty, respect, and integrity by, for example: <ul style="list-style-type: none"> <li>• Making sound and timely decisions</li> <li>• Seeking and accepting responsibility for actions</li> </ul>	E, F, I		
<b>2.</b> Demonstrate understanding of EOC and Policy Group roles, responsibilities, and authorities: <ul style="list-style-type: none"> <li>• Describe how this mission may change in a different organization, jurisdiction, or operating environment</li> </ul>	E, F, I, J, T		
<b>3.</b> Demonstrate understanding of external sources of assistance: <ul style="list-style-type: none"> <li>• What resources could be available</li> <li>• When they could become available</li> <li>• How to acquire them</li> <li>• Necessary approvals</li> </ul>	E, F, I, J, T		
<b>4.</b> Communicate vertically and horizontally to facilitate and inform decision-making: <ul style="list-style-type: none"> <li>• Communicate options, considerations, and recommendations</li> <li>• Keep subordinates informed</li> </ul>	E, F, I		
<b>5.</b> Help develop strategies and tasks to support the goals and objectives of incident command or the EOC.	E, F, I		
<b>6.</b> Obtain relevant information for operational decisions.	E, F, I		
<b>7.</b> Guide personnel as they identify and address gaps in critical information.	E, F, I		
<b>8.</b> Establish metrics and benchmarks for program performance and monitor progress through completion.	E, F, I, J		
<b>9.</b> Monitor and manage stakeholder expectations: <ul style="list-style-type: none"> <li>• Communicate policy, process, and procedural changes</li> </ul>	E, F, I		
<b>10.</b> Order and organize resources to achieve objectives: <ul style="list-style-type: none"> <li>• Understand constraints and limitations</li> </ul>	E, F, I, J		
<b>11.</b> Continuously evaluate EOC processes, procedures, and priorities: <ul style="list-style-type: none"> <li>• Coordinate with performance improvement personnel</li> </ul>	E, F, I, T		

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>12.</b> Suggest ways to improve processes and procedures, and then help implement improvements: <ul style="list-style-type: none"> <li>• Facilitate conversations about process performance</li> <li>• Assess processes</li> <li>• Determine gaps</li> <li>• Take steps for improvement</li> </ul>	E, F, I		

**Task Category: Supervise staff to ensure understanding and accomplishment of duties and tasks**

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>13.</b> Use leadership styles appropriate to the situation.	E, F, I		
<b>14.</b> Establish and communicate processes and procedures.	E, F, I		
<b>15.</b> Assign tasks and clearly communicate expectations.	E, F, I		
<b>16.</b> Emphasize and foster teamwork.	E, F, I		
<b>17.</b> Manage conflict and coordinate problem-solving: <ul style="list-style-type: none"> <li>• Manage conflicting viewpoints</li> <li>• Assess alternative courses of action</li> <li>• Determine and communicate a way forward</li> <li>• Ensure follow-through and escalate to appropriate level as necessary</li> </ul>	E, F, I		
<b>18.</b> Prepare and discuss feedback with subordinates: <ul style="list-style-type: none"> <li>• Monitor performance and discuss task understanding</li> <li>• Evaluate performance and complete personnel performance evaluations</li> </ul>	E, F, I		
<b>19.</b> Support the health, safety, and welfare of assigned personnel: <ul style="list-style-type: none"> <li>• Direct operations based on health and safety considerations and guidelines</li> <li>• Ensure that personnel follow safety guidelines appropriately</li> <li>• Spot-check operations to ensure compliance with safety guidelines</li> <li>• Make resources available to support staff health and safety</li> <li>• Monitor staff for mental and physical fatigue</li> </ul>	E, F, I		

**Task Category: Coordinate to foster unity of effort**

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>20.</b> Establish and maintain positive interpersonal and interorganizational working relationships.	E, F, I, J		
<b>21.</b> Demonstrate ability to influence others outside your chain of command.	E, F, I, J		
<b>22.</b> Ensure staff activities align with the EOC's operational rhythm.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Performance Improvement

### Task Categories:

Collect and analyze information regarding EOC activation and activities

Suggest process improvements and solutions during EOC operations

Support process improvement following EOC deactivation

### *Task Category: Collect and analyze information regarding EOC activation and activities*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of the after action review and improvement planning process, including the types of information gathered and the feedback process.	E, F, I, J, T		
2. Collect, store, and analyze data for the after action review and improvement plan.	E, F, I		
3. Perform real-time data collection during response: <ul style="list-style-type: none"> <li>• Use accepted tools, such as EOC activity logs</li> </ul>	E, F, I		
4. Provide guidance to EOC leadership on collecting performance improvement-related data.	E, F, I		

### *Task Category: Suggest process improvements and solutions during EOC operations*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Identify best practices and areas for improvement during EOC activation, operation, and deactivation, and suggest process improvement measures to EOC staff and leadership.	E, F, I		
6. Provide recommendations to leadership for approval and dissemination.	E, F, I, J		

### *Task Category: Support process improvement following EOC deactivation*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
7. Develop an after action review and improvement planning schedule for the EOC activation that is consistent with Homeland Security Exercise and Evaluation Program (HSEEP) or similar guidance.	E, F, I		
8. Coordinate after action review-related meetings to identify and clarify areas for improvement. <ul style="list-style-type: none"> <li>• Support facilitation of meetings as necessary</li> </ul>	E, F, I, J		
9. Identify best practices and areas for improvement.	E, F, I, J		
10. Develop recommendations to address areas for improvement.	E, F, I, J		

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>11.</b> Coordinate EOC after-action report development efforts with other incident-related after-action reporting efforts.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Planning

### Task Categories:

Reference pre-incident plans

Develop and write EOC action plans and other incident-specific plans

Disseminate plans

Facilitate the ongoing planning process

### *Task Category: Reference pre-incident plans*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Gather relevant pre-incident plans, best practices, lessons learned, etc. from internal and external sources: <ul style="list-style-type: none"> <li>• Obtain additional plans from stakeholders and partners</li> </ul>	E, F, I, J		
2. Obtain additional plans or supporting documents, such as annexes and standard operating procedures, as necessary.	E, F, I		
3. Identify areas where EOC personnel may need to develop plans or supporting documents.	E, F, I		

### *Task Category: Develop and write EOC action plans and other incident-specific plans*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Demonstrate knowledge of the EOC planning process: <ul style="list-style-type: none"> <li>• Iterative action plan development</li> <li>• Development of other incident-specific plans</li> </ul>	E, F, I, T		
5. Facilitate the development of objectives and/or strategies to achieve desired outcomes: <ul style="list-style-type: none"> <li>• Ensure integration of incident command objectives, priorities, and senior leadership guidance into EOC planning</li> </ul>	E, F, I		
6. Facilitate the assessment and revision of objectives and/or strategies to ensure that they align with desired outcomes.	E, F, I		
7. Establish communication with stakeholders to facilitate planning and problem-solving: <ul style="list-style-type: none"> <li>• Understand and address stakeholder expectations</li> <li>• Incorporate nontraditional planning partners as necessary</li> </ul>	E, F, I		
8. Write or review incident-specific plans: <ul style="list-style-type: none"> <li>• With direction from EOC leadership, lead and implement the EOC planning process</li> <li>• Use appropriate formats, graphics, and maps</li> <li>• Oversee production of other incident-specific plans</li> </ul>	E, F, I		
9. Demonstrate knowledge of operational planning and continuity planning: <ul style="list-style-type: none"> <li>• Develop plans to address specific situations or needs</li> </ul>	E, F, I, J T		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
10. Seek and obtain approval for incident-specific plans.	E, F, I		
11. Monitor implementation of plans and adjust as necessary.	E, F, I		

**Task Category: Disseminate plans**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
12. Provide plans to internal and external stakeholders for implementation and awareness.	E, F, I		
13. Ensure that stakeholders are familiar with the contents, roles, responsibilities, and timelines of relevant plans.	E, F, I		

**Task Category: Facilitate the ongoing planning process**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
14. Implement EOC operational rhythm, as approved by EOC leadership: <ul style="list-style-type: none"> <li>• Coordinate the EOC planning cycle with field, Joint Information Center (JIC), Joint Information System (JIS), and other incident operations, as necessary</li> <li>• Communicate operational rhythm</li> </ul>	E, F, I		
15. Ensure integration of incident management officials, including on-scene incident and JIC/JIS personnel, into the EOC planning process.	E, F, I		



## Emergency Operations Center (EOC) Skillset: Policy and Direction

**Task Categories:**

Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent

Demonstrate an understanding of coordinated response/Unified Command and the roles and responsibilities of the parties involved

**Task Category: Demonstrate an understanding of the authorities, policies, priorities, capabilities, constraints, and limitations of the organization/jurisdiction you represent**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Provide guidance on strategic priorities and resource support to incident personnel and stakeholders.	E, F, I		
2. Demonstrate knowledge of your organization’s financial and legal regulations and general authorities.	E, F, I, J, T		
3. Demonstrate knowledge of the whole-community concept and of the impacted community’s cultural sensitivities.	E, F, I, J, T		
4. Demonstrate awareness of your organization’s operational and resource capabilities.	E, F, I, J, T		
5. Request and participate in relevant meetings and briefings.	E, F, I		
6. Work with legal counsel and EOC leadership to ensure informed decision-making.	E, F, I		
7. Authorize protective measures for life and safety, such as curfew and evacuation recommendations, based on legal authorities.	E, F, I		
8. Provide guidance and authorization for information-sharing with external agencies and the public.	E, F, I		
9. Interact with external government contacts, including those at the local, state, tribal, territorial, and/or Federal levels.	E, F, I		
10. Review and approve plans and procedures.	E, F, I		
11. Support the after action review and improvement planning process.	E, F, I		

**Task Category: Demonstrate an understanding of coordinated response/Unified Command and the roles and responsibilities of the parties involved**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>12.</b> Authorize external resource requests according to organizational authorities: <ul style="list-style-type: none"> <li>• Memorandums of Understanding (MOU)</li> <li>• Memorandums of Agreement (MOA)</li> <li>• Mutual aid agreements</li> <li>• Declarations</li> </ul>	E, F, I		
<b>13.</b> Understand the roles and relationships of the Policy Group, EOC, and other incident personnel.	E, F, I, T		
<b>14.</b> Demonstrate awareness of the impacted community, including, for example: <ul style="list-style-type: none"> <li>• Rules and regulations</li> <li>• Culture</li> <li>• Demographics</li> </ul>	E, F, I, J, T		
<b>15.</b> Participate in organizational training and exercises.	E, F, I, T		
<b>16.</b> Help establish and communicate policy decisions.	E, F, I		
<b>17.</b> Monitor objectives, strategies, and tactics for the current operational period.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Resource Ordering and Acquiring

**Task Categories:**

Order/request resources

***Task Category: Order/request resources***

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of various resource ordering/requesting procedures and requirements.	C, E, F, I, T	Option: Code C E-0973	
2. Ensure that documentation aligns with reimbursement requirements: <ul style="list-style-type: none"> <li>• Document necessary approvals</li> </ul>	E, F, I, J		
3. Ensure that requests address the resources' logistical needs.	E, F, I		
4. Identify appropriate sources: <ul style="list-style-type: none"> <li>• Intrastate agreements and compacts</li> <li>• Interorganizational agreements such as Memorandums of Understanding (MOU) and Memorandums of Agreement (MOA)</li> <li>• Emergency Management Assistance Compacts (EMAC)</li> <li>• Tribal and local jurisdiction agreements</li> <li>• Preapproved vendors and on-call contracts</li> </ul>	E, F, I, T		
5. Transmit vertical resource requests, such as from local to state or from state to Federal.	E, F, I		
6. Update status of resource requests.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Resource Tracking

**Task Categories:**

Track resources

***Task Category: Track resources***

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of EOC and field operations resource tracking processes.	E, F, I, T		
2. Monitor and track resources and supporting logistics.	E, F, I		
3. Update requestor on request status, estimated time of arrival, and related logistical details: <ul style="list-style-type: none"> <li>• Verify that provided information meets incident needs</li> </ul>	E, F, I		
4. Establish communication channels to maintain resource status.	E, F, I		
5. Track resources from initial request through: <ul style="list-style-type: none"> <li>• Hand-off to incident, or</li> <li>• Demobilization (for resources that remain under EOC management)</li> </ul>	E, F, I		
6. Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.	E, F, I		
7. Communicate with incident command and EOC stakeholders regarding resource status.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Understanding the Resource Requirement

### Task Categories:

Understand and validate the resource requirement

Communicate requirement in plain language and use national standards and common terminology

#### *Task Category: Understand and validate the resource requirement*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Communicate with requestor as necessary to understand mission and resource requirements.	E, F, I		
2. Apply awareness of the situation to initially validate resource request and anticipate unrequested resource needs.	E, F, I		

#### *Task Category: Communicate requirement in plain language and use national standards and common terminology*

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Work with subject matter experts to describe resource requirements: <ul style="list-style-type: none"> <li>• Scope the request in terms of capability rather than in terms of specific resources</li> <li>• Incorporate national resource typing definitions, as available</li> <li>• Demonstrate awareness of national standards and common terminology for personnel and resources</li> <li>• Verify request details and address missing information</li> </ul>	E, F, I		
4. Implement a resource management process, including using forms, following timelines, and identifying responsible parties: <ul style="list-style-type: none"> <li>• Use national standards and common terminology to promote ease of use</li> </ul>	E, F, I		

## Emergency Operations Center (EOC) Skillset: Situational Awareness

**Task Categories:**

- Gather data and information
- Analyze data and information
- Disseminate information

**Task Category: Gather data and information**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>1.</b> Collect and monitor data and information: <ul style="list-style-type: none"> <li>• Sources include Incident Action Plan (IAP), on-scene incident reports, EOC personnel, National Weather Service, jurisdictional liaisons, fusion centers, traditional media, social media, and others</li> <li>• Content includes demographic, damage assessment, infrastructure, supply chain, and geographic data and information</li> </ul>	E, F, I, J		
<b>2.</b> Coordinate information with EOC public affairs personnel and the Joint Information Center (JIC)/Joint Information System (JIS): <ul style="list-style-type: none"> <li>• Receive information from JIC/JIS</li> <li>• Provide information to JIC/JIS</li> </ul>	E, F, I		
<b>3.</b> Coordinate with EOC personnel to gather information.	E, F, I		

**Task Category: Analyze data and information**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>4.</b> Establish and implement processes for estimating cascading effects of action or inaction: <ul style="list-style-type: none"> <li>• Evaluate potential consequences and mitigation actions</li> <li>• Identify trends</li> <li>• Engage technical specialists</li> </ul>	E, F, I		
<b>5.</b> Use demographic information to inform analysis: <ul style="list-style-type: none"> <li>• Cultural diversity</li> <li>• Potential vulnerabilities</li> <li>• Damage assessment</li> <li>• Specific service needs, such as:               <ul style="list-style-type: none"> <li>○ Individuals with disabilities and other access and functional needs</li> <li>○ Individuals with critical transportation needs</li> </ul> </li> </ul>	E, F, I		

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>6.</b> Analyze information: <ul style="list-style-type: none"> <li>• Establish and implement procedures for verifying, organizing, prioritizing, and tracking information</li> <li>• Convert raw data into information</li> <li>• Identify and address misinformation</li> <li>• Verify and analyze input for critical information</li> <li>• Clarify incomplete information</li> <li>• Identify incident-specific essential elements of information and critical information requests</li> </ul>	E, F, I		
<b>7.</b> Recognize incident-specific critical information to be disseminated immediately.	E, F, I		
<b>8.</b> Prepare situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		

**Task Category: Disseminate information**

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>9.</b> Establish and implement a process for developing and disseminating situational information at regular intervals: <ul style="list-style-type: none"> <li>• Obtain approval for distribution in accordance with policies and procedures</li> <li>• Determine distribution lists</li> <li>• Determine methods for distribution</li> </ul>	E, F, I		
<b>10.</b> Follow processes for identifying, verifying, and disseminating critical information: <ul style="list-style-type: none"> <li>• Coordinate with public affairs to disseminate information externally</li> </ul>	E, F, I		
<b>11.</b> Display within the EOC situational information and data about significant events.	E, F, I		
<b>12.</b> Use visualizations such as graphs, photographs, and maps to graphically depict information.	E, F, I		
<b>13.</b> Use mapping/geospatial data and sources, including Geographic Information Systems, web-based maps, and paper maps.	E, F, I, J		
<b>14.</b> Present and distribute situational briefings, reports, displays, briefing tools, and other information products.	E, F, I		
<b>15.</b> Ensure proper security when sharing sensitive, classified, or protected information.	E, F, I		

## Emergency Operations Center (EOC) Skillset: Safety Advising

**Task Categories:**

Promote the safety of EOC personnel

***Task Category: Promote the safety of EOC personnel***

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Monitor weather and other external conditions that could affect EOC facilities and the availability of EOC personnel, and communicate protective actions.	E, F, I, J		
2. Communicate and support relevant health and safety requirements and procedures: <ul style="list-style-type: none"> <li>• Brief EOC personnel on emergency procedures and safety guidelines</li> <li>• Spot-check operations to ensure compliance with safety requirements</li> <li>• Address EOC safety hazards and implement mitigation strategies</li> </ul>	E, F, I		
3. Develop and provide facility safety plan and briefing: <ul style="list-style-type: none"> <li>• Communicate locations of automated external defibrillators (AED), fire extinguishers, evacuation routes, and shelter-in-place areas</li> </ul>	E, F, I, J		
4. Identify and inform EOC personnel about mental health resources.	E, F, I, J		



## Emergency Operations Center (EOC) Skillset: Recovery Coordination

**Task Categories:**

- Understand the complexities of recovery
- Demonstrate an understanding of community impacts
- Prepare for long-term recovery

**Task Category: Understand the complexities of recovery**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of short-term, intermediate, and long-term recovery.	E, F, I, J, T		
2. Demonstrate knowledge of recovery guidance at the Federal, state, local, nongovernmental, and private-sector partner levels, including: <ul style="list-style-type: none"> <li>• National Disaster Recovery Framework (NDRF)</li> <li>• National Mitigation Framework</li> </ul>	E, F, I, J, T		
3. Demonstrate understanding of interdependencies in recovery missions (such as how housing recovery affects economic recovery) and opportunities for coordination, such as priorities identified in: <ul style="list-style-type: none"> <li>• Community hazard mitigation plan</li> <li>• Community master/comprehensive plan</li> <li>• Other applicable organizational plans</li> </ul>	E, F, I, J, T		
4. Demonstrate knowledge of eligibility requirements and opportunities related to available Federal, state, local, philanthropic, nongovernmental, and private-sector partner funding sources: <ul style="list-style-type: none"> <li>• See <a href="http://recovery.gov">recovery.gov</a> for examples</li> </ul>	E, F, I, J, T		
5. Demonstrate understanding of mitigation and resilience.	E, F, I, J, T		

**Task Category: Demonstrate an understanding of community impacts**

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Demonstrate knowledge of community demographics, culture, needs, and capacities.	E, F, I, J, T		
7. Demonstrate knowledge of the damage assessment process: <ul style="list-style-type: none"> <li>• Understand information needs during short-term and long-term recovery</li> </ul>	E, F, I, J, T		
8. Engage and coordinate with the private sector and nongovernmental organizations (NGO), including voluntary and philanthropic organizations, to support recovery.	E, F, I		

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>9.</b> Demonstrate understanding of: <ul style="list-style-type: none"> <li>• Critical infrastructure interdependencies</li> <li>• Potential impacts on the jurisdiction</li> <li>• Potential effects of prolonged service interruptions</li> <li>• Service restoration timelines</li> </ul>	E, F, I, T		
<b>10.</b> Demonstrate knowledge of economic recovery drivers for the community.	E, F, I, J, T		
<b>11.</b> Demonstrate knowledge of the whole community and any cultural sensitivities related to recovery objectives: <ul style="list-style-type: none"> <li>• Identify potential economic, cultural, and environmental impacts of implementing recovery plans</li> </ul>	E, F, I, T		

**Task Category: Prepare for long-term recovery**

<b>TASKS</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>12.</b> Support activities that promote proactive community engagement, public participation, and public awareness of short-term, intermediate, and long-term recovery and resilience, such as: <ul style="list-style-type: none"> <li>• Memorials, vigils, and emotional/mental health campaigns</li> <li>• Activities that acknowledge cultural, religious, and traditional diversity in the community</li> <li>• Collections of supplies and monetary donations</li> <li>• Efforts of Voluntary Organizations Active in Disaster (VOAD)</li> </ul>	E, F, I		
<b>13.</b> Prepare disaster recovery plans (such as an overall plan or Recovery Support Function-specific plans), including recovery roles and responsibilities: <ul style="list-style-type: none"> <li>• Prioritize recovery activities based on community needs</li> <li>• Consider funding availability, eligibility requirements, and interdependencies</li> <li>• Incorporate resilience considerations</li> </ul>	E, F, I, J		
<b>14.</b> Coordinate with EOC public affairs staff to disseminate recovery-related public information: <ul style="list-style-type: none"> <li>• Conduct outreach about Disaster Recovery Centers (DRC) and available Federal and state resources</li> <li>• Provide information to protect consumers from disreputable, opportunistic contractors</li> <li>• Combat misinformation</li> </ul>	E, F, I		
<b>15.</b> Capture and communicate economic impacts and implications, including unmet community needs, to state, local, tribal, territorial, and/or Federal leadership.	E, F, I		
<b>16.</b> Work with EOC personnel before, during, and after the transition from response to recovery: <ul style="list-style-type: none"> <li>• Disseminate recovery information and address misinformation</li> </ul>	E, F, I,		

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<b>17.</b> Advocate for recovery considerations: <ul style="list-style-type: none"> <li>• Provide briefings and recommendations to the Policy Group</li> <li>• Propose courses of action to avoid adverse effects on long-term recovery</li> </ul>	E, F, I		
<b>18.</b> Implement pre- and post-disaster mitigation and recovery plans.	E, F, I		

## Evaluation Record Form

<b>CANDIDATE NAME:</b>
<b>CANDIDATE 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 or job function:</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 candidate performed the initialed and dated tasks under my supervision. I recommend the following for this candidate's further development: <input type="checkbox"/> The candidate has successfully performed all required tasks for the position. The AHJ should consider the individual for certification. <input type="checkbox"/> The candidate 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 candidate is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a candidate for this position.
<b>Additional recommendations/comments:</b>   
<b>Date:</b>
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