

**MONTANA DEPARTMENT OF NATURAL RESOURCES and CONSERVATION
INCIDENT BUSINESS ADVISOR
OPERATING PROCEDURES**

This document emphasizes the critical financial and administrative procedures to be followed on Montana Department of Natural Resources (DNRC) incidents. The NWCG Standards for Interagency Incident Business Management handbook (SIIBM) provides national direction and the Northern Rockies Coordinating Group (NRCG) supplements (blue pages) within the SIIBM provides regional direction. Like most states, Montana has its own rules and regulations that sometimes require deviations from standard incident business management practices. Specific DNRC direction is provided through the DNRC 300 Manual -- Incident Business Management. One of the primary objectives of these guidelines is to ensure that Line Officers (LO) and/or Agency Administrators (AA) and Incident Commanders (IC) are reviewing incident costs daily and documenting those reviews. These procedures are also provided to support Incident Management Team (IMT) operations and to provide consistency in incident business management operations throughout the State of Montana.

Any changes in these guidelines will be negotiated with the LO and/or AA, Incident Business Advisor (INBA) and the DNRC Westside/Eastside Incident Business Specialist in advance. Cost management and accountability are mandatory.

DNRC Westside and Eastside Incident Business Specialist (IBS)

The DNRC IBS are responsible for the coordination and liaison of Incident Business administrative guidelines and practices for incidents with the DNRC. These positions will be a source of information for national, regional, and State incident business knowledge.

	Name	Office Phone	Cell Phone
Susan Dowler	Westside Incident Business Specialist	406-751-2245	406-461-9977
Becky Shepard	Eastside Incident Business Specialist	406-535-1902	406-366-1879

INBA Direction/Responsibility

The hosting incident Area /Unit office will complete the DNRC INBA Direction Template, and the contact tables listed below before issuing these guidelines to an IMT. The INBA will meet with the Line Officer to determine expectations, roles, responsibilities, and incident agency(s) concerns. The INBA will be given a Delegation of Authority for the expectations of the Line Officer.

Title	Name	Office Phone	Home Phone	Cell Phone
Incident Business Advisor (INBA)				
Incident Business Advisor (INBA) Trainee				

The names and phone numbers for State and local incident administrative contacts are provided in the following table (hosting incident Area/Unit to provide).

Title	Name	Office Phone	Home Phone	Cell Phone
Line Officer				
DNRC Land Office Area Mgr.				
DNRC Area Office Business Mgmt. Coord.				
Westside IBS	Susan Dowler	406-751-2245		406-461-9977
Eastside IBS	Becky Shepard	406-535-1902		406-366-1879
DNRC Fire Finance & Incident Business Supervisor	Joanne Marceau	406-542-4252		
Other				

DNRC Incident Business Advisor Responsibilities

Each DNRC Area and Unit office should assign an INBA responsible for fulfilling INBA responsibilities on their unit. The local INBAs should be in charge of day-to-day incident costs as well as “Severity”. One or more fully qualified INBAs normally will be brought in on Type II or larger incidents as well as INBA trainees. The INBA works under the direct supervision of the LO and/or AA and provides needed coordination with the IMT during the incident. Where multiple jurisdictions exist, a DNRC INBA may be working alongside a federal INBA. The DNRC INBA has a similar role to their Federal INBA counterpart in large incident situations, but with additional responsibilities including providing direction for State of Montana cost reporting, obligations reporting, cost management, and final fire package preparation. The INBAs job cannot be done by only attending morning and evening briefings and working occasionally with the Finance Section Chief.

The INBA will:

- Conveys and defines the Line Officer’s administrative and fiscal direction to incident management teams, buying teams, expanded dispatch organizations and area command teams that may be supporting DNRC.
- Provide recommendations on administrative issues needing resolution.
- Be a source of national, regional, State, and local knowledge
- Be a helpful consultant (partner) to the Agency Administrator and/or Line Officer and the incident’s command and general staff.
- The INBA will be a person with extensive incident experience and is **able to effectively work with people, including the AA and/or LO.**

When working on a Type 3 incident, the workload and parameters will be totally different than working with an IMT 1 or 2 on a multi-jurisdictional incident. On Type 3 incidents and especially working with the State of Montana County Assistance Team (CAT) you will not interface with buying teams or expanded dispatch and be involved in the type of briefings and planning meetings that you will see on Type 1 or 2 incidents. Your interaction as an INBA on these types of incidents is still very important.

As a minimum, the Finance Section Chief will arrange for a **daily** flow of information with the INBA. This will include a report of current progress of incident business administration operations, including copies of the current cost projections.

The Finance Section Chief will contact the INBA at least 48 hours prior to demobilization to ensure all transitioned financial and administrative processes have been finalized. The INBA will follow-up with the LO to ensure that a smooth transition with the IMT occurs. All unresolved or open financial items will be documented and the individual responsible for the follow-up action will be identified.

The INBA will participate in the close out of each assigned IMT. The INBA will complete a Unit Log (ICS214) each day with activities and issues of the day and will provide a final narrative statement of items that went well, items that need improvement, and provide recommendations to the Line Officer. DNRC INBA's will utilize the INBA Job Aid as a supplement to the Operating Procedures.

If the INBA is unable to complete the narrative report prior to demobilization of the IMT, the report will be submitted through the LO to the IC within 60 days after the IMT departs the incident.

The INBA will ensure that financial records are complete, and any issues left from the incident are documented. The Finance Section Chief will **certify** this in the **Team Transition Plan**.

The INBA will check the incident property records to ensure that property is recovered and/or disposed of properly on the incident. Property remaining on the incident is documented and **certified** in the **Team Transition Plan**.

Cost Management

Cost management within the DNRC is a high priority. Daily cost validation to ensure the Wildland Fire Situation Analysis (WFSa) or Wildland Fire Decision Support System (WFDSS) is valid will be done by projecting costs for the duration of the WFSa/WFDSS based on operational projections.

In dealing with cost management issues, it is important for the INBA to be a partner with the IMT and LO and/or AA for effective cost management balances, taking into consideration fire suppression tactics and strategies, relative to the incident and ensure fire records meet DNRC standards. This requires aggressive action to highlight inappropriate or questionable procurement requests as well as ineffective use of items under contract, plus exploration of alternatives, whereby joint IC, LO and/or AA decisions can be made.

Monitors business management practices and incident operations to assure cost management objectives are met. Focus on high-cost aviation resources, under-utilized equipment, extravagant purchases, sensitive items and property accountability issues. INBAs should raise unresolved cost concerns to the AA and/or LO and include all issues, recommendations and outcomes in their daily unit log and the narratives. In all three types of incidents, this may include going to the fireline to look at resource utilization and asking questions of planning and operations personnel before submitting any documentation to the AA and/or LO.

Supplemental Foods

The NWCG Supplemental Food and Drink Guidance, RMC Memo No. 21-01 dated June 25, 2021, is in effect in the Northern Rockies Region (Region 1). This can be found at: <http://dnrc.mt.gov/divisions/forestry/fire-and-aviation/fire-business/forms-and-information>

Specific DNRC policies are found in the DNRC 900 – Fire Suppression Manual – Section 963 – Supplemental Food Policy.

Procurement

The majority of hiring and procurement is done through dispatch or expanded dispatch and buying teams. DNRC has a very strong commitment to purchase and hire locally, but also strongly discourages smoke chasing.

Upon arrival on the incident, the Finance Section should be given an Incident Service and Supply Plan if one has been established. If available, an employee from the host agency procurement staff should discuss information provided in the plan with the INBA. This plan has now become primarily electronic files instead of a large binder(s) with copies of agreements, EERAs, maps, forms, etc.

The Service and Supply Plan could include the following:

- Acquisition Organization
- Emergency Services (including medical care information)
- Listing of Emergency Equipment Rental Agreements (EERAs)
- Local interagency agreements and operating plans
- Procurement and Contracting Procedures
- Geographic Area Equipment Rates (SIIBM, Chapter 20 and 50)
- Order Forms, if any
- Maps – geographical information
- Buying Unit Procedures
- Listing of Supply/Service Vendors including phone and address information

Utilize the SIIBM, Chapter 20, for all equipment hiring practices, including competed resources and other items where bids were solicited by DNRC and/or federal agencies. Although DNRC does recognize federal contracting authority, federal agencies do not recognize DNRC contracting authorities. Chapter 50 of the SIIBM should be used for the hiring of Local Government resources.

Many of the normal restrictions on purchasing supplies and services apply when buying for incident operations. Some exceptions exist. Procurement personnel should consult with the INBA before purchasing items of questionable nature or questionable quantities. The NWCG Supplemental Food Policy is the standard for the Northern Rockies.

The Procurement Unit Leader (PROC) should communicate with the Supply Unit Leader and Buying Team leader throughout the incident. The open flow of communication between parties will facilitate acquisition needs, as well as property tracking.

DNRC employees have broad purchasing authority in emergency situations and must be on the DNRC Fire Authorized Signers List to sign agreements (see DNRC Procurement and Contracting Manual). When time permits you should negotiate with vendors, use phone quotes or other means to secure the best value available, particularly for large, high value orders.

Purchase/Rental of Personal Property

In accordance with State Purchase regulations, the decision to purchase property should be made on a case-by-case basis through evaluation of comparative costs and other factors. These purchases need to be approved through the INBA/LO. Some factors to be considered are:

- Estimate the length of time the equipment will be used
- Cumulative rental payments for the estimated period of use
- Net purchase price
- Transportation and installation costs
- Maintenance and other service costs
- Whether a rental-with-purchase option is available
- Cost of handling and disposal following the incident

The length of time the equipment will be utilized is often unknown. The use of day/week/monthly rental rates may help lower overall costs.

The INBA needs to be involved in these decisions as well as detailed consultation with justification made to the AA and/or LO, prior to ordering. The majority of procurement for services/supplies should be coordinated through the Area/Unit Office. Procurement authority is defined by each Area/Unit Office. The AA and/or LO should make this policy clear in the in briefing with the IMT.

Telephone Use Policy

IMTs cannot provide telephone lines for incident personnel to make personal calls. Personal calls may be made using the incident phone system provided this use does not interfere with incident operations and long-distance calls are not billed to the incident. Collect calls, phone cards or personal calling cards may be used.

DNRC may choose to provide cell phones for IMTs rather than authorize the use of the teams existing cell phones. **Cell phone costs can only be reimbursed with the written authorization**

of the AA or LO. Simply stating that a person is ordered with a cell phone on the resource order does not ensure that reimbursement for the use of that cell phone will be made. This simply states that if a cell phone is lost or destroyed due to the fire, it can be replaced by the incident.

Property Management

DNRC expects the IMT to place a high priority on property management. Included in this expectation is the need for the Finance Section to review property issuance (including gas/oil/cache items/other), sign out, and return procedures to ensure property accountability. The buying team leader should assume responsibility for coordinating with the incident on property tracking. Buying teams are responsible for ensuring that accountable property they have purchased is tracked and the appropriate information is available to the incident for record keeping purposes.

During the demobilization process, agency specific forms (Lost and Stolen Reports) will be processed when items are not returned to supply. The employee's supervisors will always sign these forms. If property items are not returned by vendors and/or contractors assigned to the incident, a system will be incorporated to ensure the value of missing items is deducted from the payment invoices. Values to be assigned may come from the buying team or from the Supply Section. The Finance Section is responsible for making the appropriate deduction prior to issuing the final OF-286.

All property treated as replacement will be so described on agency specific forms, waybill or left on the incident for mop-up or rehab. All property left at the unit at the close of the incident, will be property transferred on the proper agency form.

All local purchased items must be separated and returned to the host DNRC unit and/or area office.

The INBA is a key factor in the monitoring of both the ordering and inventory control of cache and locally purchased items. Supply orders should be reviewed on a daily basis and copies of cache items issued and returned should also be obtained from the NR Cache regularly. INBAs need to work closely with the IMT relative to inspections to ensure property losses are as low as possible. The AA and/or LO can include this in the delegation of authority and the in briefing to the IMT.

Special emphasis must be made on inventory control once demobilization begins. A Cache Demob Specialist should be ordered to handle demob of cache supplies, regional and national, to ensure that all durable and accountable property items are carefully tracked and that all items returned are credited and accounted for and returned within the required cache time limits.

Compensation for Injury and Agency Provided Medical Care (APMC)

All employees that require medical care beyond what can be provided at the camp must be handled through the appropriate employees' workers comp division. For State of Montana employees including regular employees, seasonals and EFF's, the claims will be handled through the Montana State Fund.

The employee's incident supervisor is responsible for preparing a "First Report of Injury" if any State of Montana employee, including Emergency Firefighters, is injured while assigned to an incident. Refer to the SIIBM, Chapter 10 Northern Rockies supplement, Exhibit NR3 for additional direction. *Failure to report the injury can jeopardize coverage for the employee.*

Each Area/Unit office or host agency has at its discretion the ability to use APMC in a limited manner for minor injuries to return an employee to work status. Each Area/Unit Office will establish contact and a procurement mechanism with local medical facilities prior to fire season. Each Area/Unit office will also identify a contact person for coordination with the IMT.

If medical care is not available at the fire or there is a minor injury that needs acute minor medical attention to return an employee to work, please contact the local Area/Unit office for approval for APMC. Refer to Chapter 10, Section 15.2 (white pages) and the Northern Rockies Supplement to Chapter 50 of the SIIBM for APMC guidelines.

Employees of the State of Montana **MAY NOT UTILIZE** APMC (Agency Provided Medical Care) for medical treatment received on State of Montana incidents. All medical charges for State of Montana employees, including EFFs, must be handled through the Montana State Fund. State of Montana employees **MAY** utilize APMC, if available, for medical treatment received on any Federal incident. The "First Report of Injury" along with a completed copy of the Federal APMC form must be submitted to the Montana State Fund. This alerts State Fund to the injury, if follow-up is needed and provides them with the initial medical report.

Federal employees **MAY** utilize APMC, if available, for medical treatment received on a State of Montana incident according to the guidelines in the SIIBM, Chapter 10 and Northern Rockies Coordinating Group (NRCG).

Claims

Please review the Claims Chapter 370 in the DNRC 300 Incident Business Manual at: <http://dnrc.mt.gov/divisions/forestry/fire-and-aviation/fire-business/forms-and-information>
Upon arrival to the incident, the Comp/Claims Unit Leader or applicable position that has the responsibility for handling comp/claims should make contact with the AA or Line Officer to determine the expectations and discuss the requirements of the claims process.

Note the distinction between an **actual** claim and a **potential** claim. INBAs should be notified and review all potential and actual claims. A potential claim could include documentation or statements regarding an accident or incident even though no written request for compensation or written notice of a claim from the claimant was received. All documentation on potential claims should be retained in the Claims Section of the incident finance package, but clearly identified as "Potential Claim Documentation".

When a written request for compensation or reimbursement for damages is received, it is a legal actual CLAIM. Relevant documentation must be obtained at the incident. Include all documentation for unsettled claims in the Claims Section of the incident finance package and clearly identified as "CLAIMS".

Forms or other documents should be provided for the duration of the incident. The INBA should also be available to support the Comp/Claims Unit Leader when issues arise that might require research of unusual situations, authorities, etc.

Contract Claims – Damaged equipment belonging to a private contractor: If delegated to the IMT, the Procurement Unit Leader may be responsible for settling contract claims involving equipment agreements at the incident, when possible, and with the approval of the AA or Line Officer and/or INBA. Any claims that cannot be settled on the incident will then be the responsibility of the agency. At the end of the incident all actual and potential non-contract claims will be fully documented and turned over to the Line Officer. Use of Incident Case File Envelope (OF314) is strongly recommended.

Tort Claims– Alleged negligence or wrong doing by the Government or a Government employee: notify AA or Line Officer immediately upon learning of a possible tort claim. Agency legal staff and MTDOA Tort Claims Division are involved immediately.

Employee Claims – Lost, stolen, damaged personal property of a Government employee: should generally be settled at the employee’s home unit upon return from the incident.

Incident Payments

Directions for transmitting financial documents should be closely followed to ensure prompt payments to vendors. Local incident units are responsible for ensuring that the payment packages contain the required documentation. For payment package guidance please see the DNRC Fire Payment Approval Sheet at: <http://dnrc.mt.gov/divisions/forestry/fire-and-aviation/fire-business/forms-and-information>. If assistance is required, please contact the DNRC Fire Finance & Incident Business Supervisor or Fire Finance Specialist.

Cost Estimates – e-ISUITE

e-ISUITE should be used for incident cost analysis and reporting. Multi-jurisdictional incidents may require additional cost tracking measures to comply with cost share agreements. Close coordination with DNRC will be necessary.

The INBA should work closely with the Finance Section Chief or Cost Unit Leader to ensure that the necessary cost estimates are submitted as requested to the DNRC Agency Administrators, Line Officers, Fire Protection Bureau and the Forestry Division Office.

Close coordination with DNRC’s Incident Business Specialists and the FEMA Cost Recovery Team will be necessary, if applicable.

End of Pay Period Time and Attendance Reports

The DNRC INBA should determine the most efficient and effective means for processing/communicating their pay information at the end of each applicable pay period. In most cases this will be done by the INBA processing their pay information directly into SABHRS.

Closeout

The final incident finance package must meet the standards as outlined in Chapter 40 (white pages) of the SIIBM or to specific agency guidelines.

Record copies of all payment documents must be retained on the incident for all partial payments or final payments made prior to the close of the incident and returned to the agency as a part of the complete package. In most cases, but not always, originals will be given to the resource to take home to their home unit for processing. The exception to this is for contract payments.

The incident finance package is usually transferred to the host agency at the close of the incident, including long incidents requiring the use of more than one IMT. In such cases, the initial and each successive team should continue to ensure there is a well-documented, organized and indexed incident finance package to present to the incoming team. A single package is then presented to the host agency at the close of the incident.

When an incident is a declared FEMA incident, it will be mandatory that the DNRC Forestry Division Office receive a complete duplicate incident finance package.

The INBA will participate in the close out of each assigned IMT. The INBA will provide a verbal assessment as well as a written assessment of the following:

- Commendable performance
- Things that went well
- Things needing improvement