IBA
JOB AID

TABLE OF CONTENTS:

The DNRC Incident Business Advisor works for the Agency Administrator (Line Officer) and has five primary responsibilities:

1. 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.
2. Advises the Line Officer regarding incident business management practices as needed.
3. Advises the IMT and other organizations of DNRC specific business management practices and provides information as needed.
4. Monitors business management practices and incident operations to assure cost management objectives are met.
5. Ensure fire records meet DNRC standards and both the cost unit database and report products support DNRC's need to implement cost share agreements, provide FEMA documentation or other specific needs.

This job aid contains information and forms recommended for use by the Incident Business Advisor. This job aid cannot be used by itself. It contains supplemental material to the Interagency Incident Business Management Handbook. If contradictions occur, the Incident Business Management Handbook takes precedence. Incident Business Advisors should be thoroughly familiar with all chapters of the Incident Business Management Handbook.

A. GENERAL 3
- Obtain and Assemble Materials Needed for Kit 3
  - a. Reference material 3
  - b. Additional kit items 3
  - c. Forms 3
  - d. Supplies 4

B. MOBILIZATION 4
- Obtaining information from dispatch 4

C. INCIDENT ACTIVITIES UPON ARRIVAL 4
- Briefing with Line Officer, Agency Administrator, IMT 4
- Meeting with personnel you will be interfacing with 4
- Gathering information and accessing incident assignment 5

D. INCIDENT ACTIVITIES DURING THE INCIDENT 5

E. DEMOBILIZATION or TRANSITIONING 7

F. APPENDICIES & FORMS
- EERA documentation for payment requirements 8
- Tips for Auditing EERAs 9
- IBA Questions 11

A. GENERAL

Obtain and assemble information and materials needed for kit

- ❑ Kit will be assembled and prepared prior to receiving an assignment. Kit will contain critical items needed for the assignment and items needed for functioning during the incident. Kit will be easily transportable and within agency weight limitation (per National Interagency Mobilization Guide). NOTE: save your forms and reference materials on a thumb drive.
- ❑ 3 ring binder prepared in advance for each incident with suggested tabs labeled as follows:
  - Resource Order
  - In-briefing and delegation of authority
  - Narrative, Performance Evaluation & Unit logs
  - WFSA
  - Cost Share if applicable
  - Public Information & Photos
  - IAPs

Reference Material

- ❑ Operating Guidelines for MT DNRC IBAs
- ❑ IBA Guide (PMS314 – August 1999)
- ❑ MT DNRC 300 Incident Business Management Manual
- ❑ DNRC Operating Guidelines
- ❑ NWCG Fire line Handbook, PMS 410-1
- ❑ Interagency Incident Business Management Handbook (IIBMH), NFES 2160 & Supplements
- ❑ Geographic area Supplement to IIBMH (Pay Plan for Emergency Workers – AD Plan and MTDNRC Emergency Firefighter plan and equipment rates)
- ❑ Service/Supply Plan (operating plan) provided by Host Agency
- ❑ Cooperative Fire Protection Agreements
- ❑ Statewide Annual Operating Plan
- ❑ Regional Contracts (water handling equipment, potable water, portable toilets, etc)
- ❑ National Interagency Mobilization Guide (NFES2092)
- ❑ Regional Interagency Mobilization Guide
- ❑ Interagency Standards for Fire and Fire Aviations Operations
- ❑ Geographic area specific agreements (Native American Crews - NAC)
- ❑ Supplemental Food Policy

Additional kit items to supplement as needed for specific assignment upon dispatch/arrival

- ❑ Local, unit and geographical area telephone listings (*obtain from incident unit*).
- ❑ Buying Team Guide
- ❑ Geographic Area Mobilization Guide and/or Local Mobilization Guide.
- ❑ Expanded Dispatch Plan
- ❑ Critical Incident Management Guidelines (Agency specific)

Forms – (hard & electronic copies)

- ❑ IBA Narrative template & Evaluation Form
- ❑ ICS 203 & ICS 207 Organization Assignment List & Chart
- ❑ ICS 213, General Message
- ❑ ICS 214, Unit Log
- ❑ EERA's
- ❑ Emergency Firefighter Time Report – OF286 (for own use)
- ❑ Crew Time Reports
- ❑ Emergency Equipment Shift Tickets
- ❑ Property Accountability Plan
- ❑ Restaurant Lodging Form

- ❑ Land Use Agreements
- ❑ Local Government Agreements
- ❑ Fire Chief Certification Forms
- ❑ Final Incident Documentation Package (7/12/2006)
- ❑ IBA Performance Rating

Supplies

- ❑ Name Tag
- ❑ Thumb drive with forms, supplements, etc.
- ❑ Notepads, envelopes, folders, calculator, batteries, clipboard, paperclips, pencils, pens, staples, stapler, staple remover, sticky notes, and tape
- ❑ Laptop & printer **needs to be approved by requesting office and on Resource Order*
- ❑ cell phone **on Resource Order for reimbursement*
- ❑ Statewide dry erasable map
- ❑ Camera

B. MOBILIZATION

- ❑ **Obtain complete information from dispatch upon initial activation**
  - Get a printed copy of your Resource Order. If you get reassigned, get a printed copy of your new Resource Order and make sure home unit gets copies. (Out of state assignments require the P#)
  - Incident name
  - Incident order number
  - Request Number
  - Special provisions approved
  - Reporting location
  - Time of arrival
  - Transportation arrangements/travel routes
  - Contact procedures during travel (telephone/radio/Cell phone)
  - Obtain lodging information. Make motel reservations if necessary.

C. INCIDENT ACTIVITIES UPON ARRIVAL

You are responsible for asking adequate questions that will allow satisfactory completion of all aspects of your job. Try to attend the Team in-briefing if possible.

- ❑ Attend LO, AA or Incident Management Team briefing
  - Obtain delegation of authority with clarified expectations, roles and responsibilities
    - IBA delegation
    - Team delegation
  - Receive priorities, goals and objectives for management of the incident
  - Obtain current copy of the IAP & WFSA
  - IMT operating guidelines
  - IMT transition plan (if applicable)
  - Business Management Issues
    - Cost containment, claims, payments, local hires
  - Identify all agencies are involved and any political concerns
  - Current and projected incident status
  - Resources on site/ordered
  - Controversial issues
  - Is there a need for additional support teams(i.e. buying team)
  - Is it reasonable to have a trainee?

- ❑ Meet with personnel that you will interface with
  - Finance
  - Logistics
  - Supply
  - Buying team
  - Dispatch – agency and expanded
  - Agency personnel
  -
- ❑ Gather information necessary to assess incident assignment and determine immediate needs and actions.
  - Incident Team Meeting Schedule
  - Cost Reports
  - Area maps
  - APMC process/availability
  - Local contact names and phone numbers (FMO, AO, ED, BT, etc)
  - Supplies on order
  - Outstanding Resource Orders
  - Procedures for hiring casuals
  - R&R policy
  - Property Management Guidelines/Procedures for documenting lost and stolen property

D. INCIDENT ACTIVITIES DURING THE INCIDENT

- ❑ Attend meetings
  - IMT briefings/meetings
  - Transition meetings
    - Provide input
    - Transition with replacement IBA if being replaced
  - Closeouts – provide input

- ❑ Evaluate and share with the LO and/or AA and other agency staff, pertinent information which may affect incident business management.
  - Provide summary information on current incident business management operations.
  - Review agency/unit guidelines for incident business management with appropriate staff.
  - Meet with incident agency/unit staff and support unit personnel (Buying Team, Payment Team, Expanded Dispatch, Dispatch Center Manager, etc.) throughout the incident assignment to identify and discuss concerns and share information.
  - Establish procedures to facilitate communication and resolution of incident business management issues
  - Identify additional resources needed
  - BT, Claims/Damage Assessment, Cost Apportionment, Demob Specialist

- ❑ Review incident business reports/documents to ensure agency/unit direction is being met and that requested reports are accurate and timely.
  - WFSA and daily certification
  - Contracts
  - Memorandums of Understanding
  - Cooperative Agreements
  - Cost Share Agreements
  - Cost reports generated by IMT
  - Cache issues and returns regularly

- ❑ Interact and coordinate with agency staff, IMT, Interagency Cooperators, and other support units. Receive and provide current information.
  - Provide contact information
  - Schedule visits to the Incident Command Post (ICP), incident agency/unit and support units.
  - Review/discuss impact on host agency's fiscal staff
  - Schedule conference calls, if needed

- ❑ Identify fiscal process for:
  - Per diem/travel authorization
  - Payment of state agreements by federal buying teams
  - Claims settlement
  - Cost information
  - Credit card/convenience check usage/documentation
  - IMT's Fiscal Financial Package w/FSC
    - Coordinate with agency support units to the quality of final documentation they are receiving

- ❑ Meeting with FSC and Logistics
  - Personnel timekeeping problems
    - Over 16
    - R&R
    - Standby/Staging
    - Other
  - Equipment Timekeeping Problems
  - Claims
  - Cost
  - Commissary
  - Vehicle Accidents
  - Property Accountability
  - Payment Documents
  - DNRC contracts
  - Problems with camp, supply orders, outstanding orders

- ❑ Red Flags to consider:
  - Incidents merging or splitting
  - Cache supplies or equipment transferred from one incident to another
    - Incident transfer policies must be strictly followed
  - FEMA declared
  - Out of area IMTs
    - Ordering out of area name requests from home area
    - Assure IBMH and NRCG policies are followed
  - Cost Share/Decision Document
  - Out of area buying team
    - Using non-local resources when local are available
    - Pre-canned orders
  - National Crews

- ❑ Cost Management Concerns **** this was audit driven in 2005*
  - Any new direction from AA or LO pertaining to cost analysis and expenditures
  - Evaluation of existing contracts and agreements
  - Review of daily and cost-to-date figures by Cost Unit Leader or FSC.
  - Are DNRC costs being reported to Forestry Division?
  - Assess the detailed use and cost of Air Operations

- Are there any resources that are either high cost or underutilized that need to be evaluated and released?
- Are demobs happening as quickly and efficiently as possible?
- Is there compliance with policy for supplemental food and drink
- Is the organization the 'right size' with incident needs and Agency direction
- Is there coordination with local units and adjacent incidents to share resources
- Are shift lengths managed for cost effectiveness, adhering to work/rest guidelines and safety?
- Are contracted resources being managed effectively?
- Are local vendors being utilized for supplies?
- Have there been any preseason agreements set up?

❑ Daily documentation
- Include written documentation of decisions made and changes recommended
- Maintain a daily record of activities (ICS Form 214 – Unit Log)
- Advise LO and/or AA to address resource needs throughout the assignment (e.g., buying team)

E. DEMOBILIZATION or TRANSITION

❑ Is a Cache Demob Specialist needed?
❑ Prior to release from an incident
- Review the incident demobilization plan and provide input to the LO and/or AA, as necessary.
- Complete the debriefing and closeout tasks

❑ Participate in financial closeout with incident finance section and ensure that agency incident finance package requirements are met
❑ Participate in final closeout
❑ Participate in IMT debriefing with the LO and/or AA.
❑ Participate in a closeout session with agency/unit administrative staff.
❑ Provide IBA narrative to LO including advice/recommendations/critiques
❑ Obtain your performance evaluation
❑ Provide key contact information for issues that may require follow-up
❑ Follow up with area office for processing of paperwork

From: Jeff Williams
RE: Documentation Needed to Make Payments for Equipment Used on Fires

To help ensure compliance with recent audits, the IIBMH and the Best Value Contract, please comply with the following:

General:

1. On any of the documentation, if the signature is illegible, please print the name underneath the signature. In the event a question arises, there will be a need to contact the parties involved.

2. Generally speaking, contracts can only be modified by the issuing contract officer. A note by anyone other than the issuing contract officer changing the terms of a contract is (probably) not acceptable.

Specific Items Required for Each Payment

1. Copy of the Emergency Equipment Rental Agreement, OF-294.

2. Documented proof that the equipment was ordered, this should be in the form of a Resource Order. If these are not available due to circumstances such as severity or initial attack, please print the name and phone number of the DNRC employee ordering the resource in space marked #12 Resource Order Number on the Emergency Equipment – Use Invoice. **(Not required for initial attack– note IA on shift ticket)**

3. Copy of pre and post Vehicle/Heavy Equipment Safety Inspection Checklists OF-296. Box 10 of the pre-use inspection form is used to determine the start of the operation time. **(Not required for initial attack– note IA on shift ticket)**

4. Original Emergency Equipment Shift Tickets, OF-297, vendor provided daily work sheet, or other document provided by incident. Please make sure there is a start time and end time for each day. Also, be sure to have a vendor signature on each shift ticket.

5. Original Emergency Equipment Use Invoice, OF-286 or original commercial vendor invoice.

Documentation required if they are used:

1. Emergency Equipment Fuel and Oil Issue, OF-304 (if deductions are made) or a log with approving official signature included.

2. Repair orders, commissary issues, findings and determinations for claims, and any other documents supporting additions or deductions to the payment.

Tips for Auditing EERAs

Pertinent documentation required:

Equipment Use Invoice OF-286 stapled to the following

- Original Shift Tickets
- Fuel deduction supported by fuel issue tickets
- Emergency Equipment Rental Agreement
- Resource Order (printed from ROSS showing how resource was filled – preferable not hand written on how filled. Also – it is preferred to not accept a log of Resource Order numbers listing resources ordered – get a copy of the actual Resource Order in ROSS with information on how filled, etc)
- Vehicle pre & post inspection
- Xerox copy of Emergency Equipment Rental Use Envelope if available

Audit Procedures

1. **Payment documents.** Ensure that payment documents with supporting invoices contain all the required approvals. Contact Incident Management Team or Incident Unit to obtain any missing documents or elements required for payment process.
   - Original Form OF-286, Emergency Equipment Use Invoice
   - Copy of Form OF-294, Emergency Equipment Rental Agreement
   - Copy of Resource Order
   - Copy of Form OF-296, Vehicle/Heavy Equipment Inspections Checklist, if available
   - Original Form OF-304, Emergency Equipment Fuel and Oil Issues, if applicable
   - Copy of Form OF-287, Commissary Issue Record, if applicable.
   - Other attachments, such as deductible repair invoices and claim settlements.

See the Interagency Incident Business Management Handbook, Chapter 20, Exhibits, for samples of these forms.

2. **Document Review.** Audit each document as follows.
   - Make sure the OF-294 is signed and dated by both the Contracting Officer and the Contractor.
   - Verify that rental rates, VIN numbers and special provisions are transferred correctly from Form OF-294 to Form OF-286.
   - For all EERAs review clauses and Regional Supplements, Special Provisions and State of Work related to the Agreement(s) to ensure invoices are filled out correctly and documented to support payment submitted for processing.
   - Verify that the dates and times are transferred properly to Form OF-286 after a complete review of Form OF-297's (shift tickets) for conflicting and/or duplication of dates and times. OF-297's must be signed and dated by the Government and the Contractor. If a signature is missing, you may fax the shift ticket to the Contractor and obtain a signature via fax. However, government signatures must be original signatures.
   - Verify unit price extensions on Form OF-286.
   - Deduct the cost of fuel, oil, repairs and/or commissary items provided by the Government. Verify that these amounts are transferred from all issue sheets.
   - Add the authorized cost of fuel, repairs, and so forth, provided by the contractor.
   - Ensure that amounts shown for settlement of disputes are documented and approved by a contracting officer, on either Form OF-286 or an attachment thereto.
   - Check that the Taxpayer Identification Number is provided.

- Contract Claims. Contract claims may be paid with a credit card or convenience check if the EERA payment(s) was processed in this manner.
- Are all invoices with hand written calculations correct?
- A Resource Order must accompany the payment package. If not, call dispatch and secure a copy of the ROSS Resource Order report. If the Resource Order does not reflect the correct date and time, a pen change to the Resource Order will be accepted. The change must have some documentation and must be signed by a member of the IMT.
- Watch for first and last days when paying time under hire or – especially if the equipment is being moved from one incident to another. Please document on the invoice and final shift ticket that the equipment is being transferred to another incident and identify name and number of incident.
- Lowboys are generally deemed demobed unless documented on the IAP or in the payment package or there is a statement that the IMT ordered the Lowboy to be held at the incident.
- When making changes to dollar amounts on the invoice, place an "x" to the left of the incorrect dollar amount and write the audited amount above the incorrect amount and initial the change (e.g.x$100.00).
- All persons submitting payment invoices must review the entire EERA to ensure daily/hourly/rates, special provisions etc., are clearly stated in the agreement and understood prior to submitting for payment.

IBA Questions

Your role as an IBA is that of advisor, facilitator, and liaison. You are there to provide fiscal oversight and agency-specific incident business expertise and advice, and to facilitate communications between the home unit, the IMT, and the support units. Upon arrival at the incident, and depending on the circumstances, the following are some questions you may need to ask.

Questions for Line officer/Agency Administrator (your boss while on the incident):

- What are your issues and concerns? What do you need from me as an IBA, how can I help you?
- How much support can I expect from the DNRC land office/unit staff and who are my primary contacts there?
- Do I have access to a cell phone/computer, etc?
- What resources (personnel/equipment, agency/fire dept/county/private contractors) are currently on the incident? What orders are expected to be filled in the near future?
- Are there any political considerations I should be aware of?
- What are the cost containment considerations – for DNRC, for the other agencies?
- What incident-specific issues are addressed in the Delegation of Authority to the IMT?
- Has the line officer met with the FSC to discuss incident finance package requirements, cost reporting requirements, DNRC-specific polices & procedures, cost containment guidelines, etc? Can I help with this?
- Who do the Buying Team and/or Expanded Dispatch report to and who is their incident agency liaison? Have operating procedures between these two support units been established?
- Is there a need for a cost-share agreement? Has one been initiated? If so, how will it affect the cost reporting requirements? Is there anything I can do to help facilitate the cost-share agreement process?
- Are there any other local agreements that I should be aware of? i.e.: Annual Operating Agreement with county, local law enforcement, etc.

Questions for IMT Finance Section Chief:

- Do you have a copy of the DNRC Operating Guidelines? Other applicable agency operating guidelines? Agency service and supply plan? The regional IIBMH supplements?
- At the AA's initial briefing, were there issues or concerns shared regarding incident business operations?
- Are you aware of the DNRC contracts in place for items such as port-a-potties and hand wash stations? Are these contracted vendors being used according to the terms of the contract?
- Are you aware of DNRC polices related to payment of county/fire dept forces? Do you need additional information or assistance?
- Is there county/fire dept involvement in the incident such that you need to order a County Agency Representative or County Fire Advisor to assist in managing these resources?
- Is the ordering schedule adequate and are the Resource Orders processed promptly?
- How are you tracking incident costs? Are you reporting them to the home unit daily?
- What are the cost reporting requirements related to the cost share agreement, if there is one?
- Have you been informed of the DNRC fire finance package requirements?
- Are there any agency-specific questions or issues that I, as an IBA, can help you with?

Questions for Buying Team Leader:

- Do you have a copy of the DNRC Operating Guidelines? Other applicable agency operating guidelines? Agency service and supply plan? The regional IIBMH supplements?
- Are you aware of the DNRC contracts in place for items such as port-a-potties and hand wash stations? Are these contracted vendors being used according to the terms of the contract?
- How are communications between Expanded Dispatch, the Buying Team, and the IMT?

- Are you tracking and reporting costs for items you are procuring for this incident? Are these costs being properly reported to the home unit?
- Do you have adequate staff, equipment, and facilities?
- What operating hours have been established? Are they adequate to meet the needs of the IMT?
- How is the ordering process going, delays, problems?
- How is accountable property being tracked and documented?
- Are you actively seeking to procure resources, supplies, and equipment locally wherever possible?
- Do you have any agency-specific questions or concerns that I can help with?

Questions for Expanded Dispatch Coordinator:

- Do you have a copy of the DNRC Operating Guidelines? Other applicable agency operating guidelines? Agency service and supply plan? The regional IIBMH supplements?
- Are you aware of the DNRC contracts in place for items such as port-a-potties and hand wash stations? Are these contracted vendors being used according to the terms of the contract?
- How are the communications between Expanded Dispatch and the Buying Team and the IMT?
- Is the IMT ordering resources through Expanded Dispatch and/or the Buying Team, or direct from the source? Are proper procedures being followed?
- Are Expanded Dispatch personnel buying direct versus going through the Buying Team? If so, is there a tracking process in place?
- What operating hours have been established? Are they adequate to meet the needs of the IMT?
- How is the ordering process going, delays, problems?
- How is accountable property being tracked and documented?
- Are you actively seeking to procure resources, supplies, and equipment locally wherever possible?
- Do you have any agency-specific questions or concerns that I can help with?

Additional sources of information:

- Attend all planning meetings and briefings related to the incident if possible
- Consult with incident unit administrative staff for questions related to issues specific to that area and local operating agreements
- Obtain the Incident Action Plan, the WFSA, and the Delegation of Authority
- Consult IIBMH, DNRC Operating Guidelines, National Interagency Mob Guide, NRCG Mob Guides for Private contractors and Local Gov't, Fireline Handbook, etc.
- Contact agency fire business management coordinators listed in the IIBMH Zero Code for agency-specific questions.