

**MONTANA DEPARTMENT OF NATURAL RESOURCES AND CONSERVATION  
INCIDENT BUSINESS ADVISORS PROCEDURES**

This document emphasizes the critical financial and administrative procedures to be followed on Montana Department of Natural Resources (DNRC) incidents. The Interagency Incident Business Management Handbook (IIBMH) provides national direction and the Northern Rockies Coordinating Group (NRCG) supplements (blue pages) within the IIBMH 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 (IBA) and the DNRC Business Specialist in advance. Cost management and accountability is mandatory.

**DNRC Incident Business Coordinator and Fire Business Management Specialist**

The DNRC Incident Business Coordinator and Fire Business Management Specialist 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.

<b>Name</b>	<b>Office Phone</b>	<b>Cell Phone</b>
	406-542-4230	
	406-542-4206	

**IBA Direction/Responsibility**

The hosting incident Area Office/Unit will complete the IBA Direction Form (see last page) and the contact tables below before issuing these guidelines to an IMT.

<b>Title</b>	<b>Name</b>	<b>Office Phone</b>	<b>Home Phone</b>	<b>Cell Phone</b>
Incident Business Advisor (IBA)				
Incident Business Advisor (IBA) 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).

<b>Title</b>	<b>Name</b>	<b>Office Phone</b>	<b>Home Phone</b>	<b>Cell Phone</b>
Line Officer				
DNRC Land Office Area Mgr.				
DNRC Area Office Business Mgmt. Coord.				
DNRC Incident Business Coord.		406-542-4230		
DNRC Business Mgmt Bureau	Sue Clark	406-542-4204	406-626-4604	406-240-1145
Other				

### **DNRC Incident Business Advisor Responsibilities**

Each DNRC Area Office and Unit should assign an IBA responsible for fulfilling IBA responsibilities on their unit. The local IBAs should be in charge of day-to-day incident costs as well as “Severity”. One or more fully qualified IBAs normally will be brought in on Type II or larger incidents as well as IBA trainees. The IBA 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, and DNRC IBA may be working along side a federal IBA. The DNRC IBA has a similar role to their Federal IBA 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 IBAs job cannot be done by only attending morning and evening briefings and working occasionally with the Finance Section Chief.

The IBA will:

- 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 IBA 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. In 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 IBA 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 IBA. 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 IBA at least 48 hours prior to demobilization to ensure all transitioned financial and administrative processes have been finalized. The IBA 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 IBA will participate in the close out of each assigned IMT. The IBA will complete a Unit Log (ICS214) each day with activities and issues of the day and will provide a narrative statement of items that went well and items that need improvement. DNRC IBA's will utilize the IBA Job Aid as a supplement to the Operating Procedures and provide an IBA narrative of the issues and outcome learned be included with the daily Unit Logs.

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

In dealing with cost management issues, it is important for the IBA 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. 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.

Focus on high cost aviation resources, under-utilized equipment, extravagant purchases, sensitive items and property accountability issues. IBAs 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 Policy dated March 10, 2003 is in effect in the Northern Rockies Region (Region 1). 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 – See IIBMH, Chapter 20, page 20-4, line 18. If available, an employee from the host agency procurement staff should discuss information provided in the plan with the IBA. 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 (IIBMH, Chapter 20 and 50)
- Order Forms, if any
- Maps – geographical information
- Buying Unit Procedures
- Supply/Service Vendors

Utilize the IIBMH 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.

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 IBA before purchasing items of questionable nature or questionable quantities. The NWCG Supplement 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 (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 IBA/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 IBA 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 Land/Unit Office. Procurement authority is defined by each Land/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 uses 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 insure 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. Roaming charges and minutes over the plan limit are not reimbursable. Cell phone use authorized for reimbursement must have 48 state coverage and plan minutes to cover use to eliminate the expensive roaming charges and extra minute charges.

## **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 information 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. 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 land office.

The IBA 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. IBAs 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, including Emergency Firefighters, is injured while assigned to an incident. Refer to the IIBMH, Chapter 50 Montana supplement and DNRC 300 – Incident Business Management Manual for additional information and where to find the instructions and copies of the proper forms. The First Report form must be transmitted to the Montana State Fund within 6 days of notification or knowledge of a work related injury. The Finance Section is responsible for transmitting the First Report, complete with attending physician's information and the

employee's signature. Faxing a copy to 1-406-444-2684 (Attention: DNRC Payroll) is the preferred method of transmitting the completed report. The IMT Comp/Claims Unit Leader ensures all original documents are forwarded to the DNRC employee's home unit. *Failure to report the injury can jeopardize coverage for the employee.*

Each Land/Unit office or host agency has at its discretion the ability to use APMC in a limited manner for minor injuries to return employee to work status. Each Land/Unit Office will establish contact and a procurement mechanism with local medical facilities prior to fire season. Each Land/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 Land/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 IIBMH 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 IIBMH, Chapter 10 and Northern Rockies Coordinating Group (NRCG).

## **Claims**

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. IBAs 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 IBA 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: The Procurement Unit Leaders are 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 IBA. 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. If assistance is required, please contact the DNRC Fire Management Business Specialist.

### **Cost Estimates – ISUITE**

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 IBA 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 and Aviation and Business Management Bureaus.

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

### **End of Pay Period Time and Attendance Reports**

The IBA should determine the most efficient and effective means for processing/communicating pay information at the end of each applicable pay period for State of Montana Employees to the Finance Section.

## **Closeout**

The final incident finance package must meet the standards as outlined in Chapter 40 (white pages) of the IIBMH 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.

The incident finance package is usually transferred to the 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 prepare 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 DNRC Fire and Aviation Management Bureau receive a complete duplicate incident finance package.

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

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