NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOK
FOR THE POSITION OF

DONATIONS SPECIALIST

Version: September 2017

Check the appropriate position type:

☐ Single Type   ☐ Type 1   ☐ Type 2   ☐ Type 3

POSITION TASK BOOK ASSIGNED TO:	
TRAINEE'S NAME:	
DUTY STATION:	
PHONE NUMBER:	
E-MAIL:	
POSITION TASK BOOK INITIATED BY:	
OFFICIAL'S NAME:	
TITLE:	
DUTY STATION:	
PHONE NUMBER:	
E-MAIL:	
POSITION TASK BOOK WAS INITIATED:	
LOCATION:	
DATE:	

Evaluator Verification

(Do <u>not</u> complete this form unless you are recommending the trainee for all-hazards certification.)

<table>
<tr><td colspan="1">FINAL EVALUATOR
VERIFICATION</td></tr>
<tr><td>I verify that _____

has successfully completed all tasks as a trainee and should therefore be considered for certification in this position. I also verify that all tasks are documented with appropriate initials.</td></tr>
<tr><td>FINAL EVALUATOR'S SIGNATURE:</td></tr>
<tr><td>DATE:</td></tr>
<tr><td>FINAL EVALUATOR'S PRINTED NAME:</td></tr>
<tr><td>TITLE:</td></tr>
<tr><td>DUTY STATION:</td></tr>
<tr><td>PHONE NUMBER:</td></tr>
<tr><td>E-MAIL:</td></tr>
</table>

Documentation of Agency Certification

<table>
<tr><td colspan="1">DOCUMENTATION OF
AGENCY CERTIFICATION</td></tr>
<tr><td>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 will hereby receive certification of his/her qualification.</td></tr>
<tr><td>OFFICIAL'S SIGNATURE:</td></tr>
<tr><td>DATE:</td></tr>
<tr><td>OFFICIAL'S NAME:</td></tr>
<tr><td>TITLE:</td></tr>
<tr><td>DUTY STATION:</td></tr>
<tr><td>PHONE NUMBER:</td></tr>
<tr><td>E-MAIL:</td></tr>
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Position Task Book Overview

The Position Task Book (PTB) documents the performance criteria a trainee must meet to be certified for a position within the National Qualification System (NQS). The performance criteria are associated with core NQS competencies, behaviors, and tasks.

> **A trainee may not work on multiple position type PTBs for a specific position at the same time; for example, a trainee 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 trainee 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 trainee'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 trainee'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 trainee'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 trainee.

- The final evaluator is a leader who verifies that a trainee has completed the PTB and met all requirements for the position. A final evaluator is generally qualified in the same position for which the trainee 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, he/she forwards it to the Quality Review Board (QRB) along with supporting evidence that the trainee has completed all position requirements.

- After the QRB review, the AHJ completes the Documentation of Agency Certification form as appropriate.

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 establishes the requirements for transferring qualifications from another AHJ.

- If an AHJ chooses not to accept a trainee's existing certification of qualification, the trainee may be reevaluated in the specific position and issued a new PTB.

- An individual may hold multiple certifications of qualification (that is, the Final Evaluator Verification form and the Documentation of Agency Certification form) along with the completed PTB.

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 a trainee 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. Trainees 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; however, bullet statements within a task are examples.

PTB Task Codes

Each task in the PTB model has at least one corresponding code conveying the circumstances in which the trainee can perform the task for evaluation. Evaluators may assess trainees during incidents, in classroom simulations and training sessions, in functional and full-scale exercises, and in other work situations. If a task has multiple codes, the evaluator may evaluate in ANY of those circumstances; the trainee does not need evaluation in all of the listed circumstances.

Code C: Task performed in training or classroom setting, including seminars and workshops.

Code E: Task performed during a full-scale exercise with equipment deployed under the Incident Command System (ICS).

Code F: Task performed during a functional exercise managed under the ICS.

Code I: Task performed during an incident or event managed under the ICS. Examples include oil spill, search and rescue operation, hazardous materials (hazmat) 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.

Code R: Task performed very rarely and required only if applicable to the event.

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.

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 trainee 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 unit address and phone: List evaluator's home unit address and phone number.

Name and location of incident or simulation/exercise: Identify the name (if applicable) and location where the trainee 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 trainee's PTB.

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

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

Evaluation Record Form

TRAINEE NAME:	
TRAINEE POSITION:	
Evaluation Record Number:	
Evaluator's name:	
Incident/office title and agency:	
Evaluator's home unit address and phone:	
Name and location of incident or simulation/exercise:	
Incident kind:	
Number and kind of resources:	
Evaluation period:	
Position type:	

Recommendation:

The above named trainee performed the initialed and dated tasks under my supervision. I recommend the following for this trainee's further development:

_____The trainee has successfully performed all required tasks for the position. The AHJ should consider the individual for certification.

_____The trainee could not complete certain tasks or needs additional guidance. See comments below.

_____Not all tasks were evaluated on this assignment. An additional assignment is needed to complete the evaluation.

_____ The trainee is severely deficient in the performance of tasks and needs further training prior to additional assignment(s) as a trainee for this position.

Additional recommendations/comments:

Date:

Evaluator's initials:

Evaluator's relevant qualification:

Donations Specialist

1. Competency: Assume position responsibilities

Description: Successfully assume the role of Donations Specialist and initiate position activities at the appropriate time according to the following behaviors.

1a. Behavior: Understand and comply with NIMS concepts and principles

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Understand scope, roles, responsibilities, jurisdiction, and authority of responding agencies: • Emergency Support Function (ESF) supporting agencies • Volunteer Task Force and Donations Coordination Task Force • Voluntary Organizations Active in Disaster (VOAD), national and state levels • Community Organizations Active in Disaster (COAD), local level	E, F, I		
2. Demonstrate knowledge of donations management structure, principles, and positions: • Donations flow structure • Donations receipt, inventory, and distribution forms • Donations recipient case management forms	E, F, I		

1b. Behavior: Ensure availability, qualifications, and capabilities of resources to complete assignment

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Support identification of the skill sets needed for leadership positions for collection centers, warehouses, distribution centers, and call centers: • Manager • Assistant Manager • Liaison Officer • Public Information Officer (PIO) • Facilities Manager • Safety and Security Officer • Volunteer Coordinator • Office Manager • Floor Manager • Receiving Manager • Sorting Manager • Processing Manager • Shipping Manager	E, F, I, J, T		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

4. Help identify specifications and secure appropriate locations for operational facilities:
• Warehouses, collection centers, distribution centers, mobile distribution, points of distribution, and call centers:
  o Location
  o Size and capacity
  o Donated or cost
  o Layout
  o Operational staff needs
	E, F, I, J, T		

1c. Behavior: **Establish effective relationships with relevant personnel**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Establish and maintain positive interpersonal and interagency working relationships: • Outgoing incident staff or teams • Local agencies • Hosting unit • Policy group • Call center staff • Warehouse staff • Collection center staff • Distribution center staff • Mobile distribution staff • Points of distribution staff • Public • Supporting agencies	E, F, I		

1d. Behavior: **Support organizational structure, reporting procedures, and chain of command of assigned resources**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
6. Support Donations Coordination Task Force activities: • Help ensure availability of appropriate resources, including equipment, trucks, and consumables (such as boxes, tape, and shrink wrap) for collection, warehouse, and distribution operations • Conduct supporting activities within operational period • Follow protocol for communicating team's daily accomplishments to the Documentation Unit or appropriate personnel • Obtain operational rhythm from supervisor and establish daily briefing/debriefing schedule with assigned personnel • Follow process for resource requests/releases for operational planning purposes • Participate in planning meetings to determine team organization, support tactical assignments, ensure resource support and coordination needs, and identify other considerations for the next operational period	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: **Coordinate interdependent activities**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
7. Coordinate with local entities: • Emergency management • VOAD • COAD • Faith-based and community-based groups • Chambers of commerce, business executives, and private sector	E, F, I		
8. Support coordinating the disposition of unusable donated items: • Trash service • Recycling company • Organizational partners having operations that may use donated goods	E, F, I, T		
9. Support the integration of all identified Donations Coordination Task Force and volunteer management partners into operations based on their capabilities and capacities: • Affiliated national and state VOAD organizations with local chapters/entities • Unaffiliated local organizations/agencies	E, F, I, J, T		
10. Offer logistical support to all donation operations, including warehousing, collections, distribution, and call centers: • Transportation needs • Securing of facilities, equipment, and supplies	E, F, I, J, T		

3. 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.

3a. Behavior: **Ensure the exchange of relevant information during briefings and debriefings**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
11. Attend leading agency official meetings, Command and General Staff meetings, and other staff meetings and briefings as the supervisor outlines and share pertinent information that may affect the team's management of the incident: • Present: o Changes to the Donations Management Plan o Current conditions, team priorities, and special considerations o Team-specific information and instructions o Special health and safety issues o Situational assessment • Receive priorities, goals, and objectives	E, F, I		
12. Attend daily Volunteer Task Force and Donations Coordination Task Forces briefings: • Receive priorities, goals, and objectives • Communicate accomplishments, concerns, or conflicts • Develop team plan based on priorities, goals, and objectives	E, F, I		
13. Support the efficient sharing of all relevant information between incident command staff and all branches of donations operations staffing: • Donations still needed or not needed • Inbound donations • Volunteer needs • Inventory • Warehouse status • Collection center status • Distribution network status • Call center status	E, F, I, T		

3b. Behavior: **Ensure documentation is complete and disposition is appropriate**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
14. Ensure the proper tracking, documentation, and reporting of volunteer hours.	E, F, I		
15. Support the creation, with Authority Having Jurisdiction (AHJ), of a vetted list of approved agencies or organizations for a distribution network.	E, F, I		
16. Use appropriate software to report, receive, inventory, and track donations.	E, F, I		

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
17. Support the development of an inventory of warehoused donated goods with disposition to appropriate agencies and authorities.	E, F, I		

3c. Behavior: **Communicate incident priorities and operations**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
18. Monitor and report flow of inbound donations.	E, F, I		
19. Coordinate with PIO/External Affairs and call centers to ensure appropriate and timely communication of donation needs and responsible donating practices: • Reference FEMA L-217, When Disaster Strikes… How to Donate or Volunteer Successfully!	E, F, I, T		

3d. Behavior: **Develop and implement plans**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
20. Participate in preparation of Donations Management Plan, planning meeting, or strategic plan for the next operational period: • Update team on current situation • Help set priorities for next operational period • Determine tasks and work assignments for next operational period(s) • Advise on current capabilities and limitations • Determine resource needs or excess	E, F, I		
21. Implement or assist in the development of existing plans or policies that address: • Monetary donations • Unsolicited donations • Corporate donations • International donations • Donated services • In-kind donations	C, E, F, I, J, T		
22. Help develop a scalable strategy for donations operations: • Open/close collections and call centers • Increase/decrease warehouse space • Increase/decrease distribution operations • Increase/decrease staffing	C, E, F, I, J, T		

4. Competency: **Ensure completion of assigned actions to meet identified objectives**

Description: Identify, analyze, and apply relevant situational information and evaluate actions to complete assignments safely and meet identified objectives. Complete actions within established time frame.

4a. Behavior: **Support the actions of the Donated Goods Warehouse Management Team and Volunteer and Donations Coordination Task Forces**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
23. Support the identification of appropriate locations for call centers, collection centers, mobile distribution, and points of distribution operations.	E, F, I		
24. Assist in securing appropriate multiagency warehouse location(s) with appropriate capacity, if necessary.	E, F, I		
25. Secure infrastructure needs for multiagency warehouse, collection, distribution, and call center operations.	E, F, I		
26. Support the execution of all standing local Memorandums of Understanding (MOU), agreements, and contracts, as directed.	E, F, I		
27. Follow all AHJ purchasing, accounting, and cost control procedures.	E, F, I		
28. Secure volunteer support for all operations.	E, F, I		
29. Support the inflow of donations under the authority of the AHJ: • Unsolicited • Solicited • Cash • Services • In-kind	E, F, I		
30. Support facility activation: • Collection centers/sites • Warehouses • Distribution centers • Mobile distribution services • Points of distribution • Call centers	E, F, I		

4b. Behavior: Transfer position duties while ensuring continuity of authority and knowledge and while taking into account the increasing or decreasing incident complexity

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
31. Support the coordination of an efficient process to mobilize and demobilize collection sites, distribution sites, multiagency warehouses, and call centers: • Identify local agency resources to continue donations services, including long-term recovery committees • Establish network for multiagency warehouse transfer, if necessary	C, E, F, I, J, T		