



# NATIONAL QUALIFICATION SYSTEM (NQS)

POSITION TASK BOOK  
FOR THE POSITION OF

## FINANCE ADMIN BRANCH DIRECTOR

Version: March 2024

Check the appropriate position type:

Single Type

*(All WVEMD SEOC positions are Single Type)*

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

## Required Training

The following courses are required for full PTB completion:

CATEGORY	CODE	TITLE
General	IS-100	Introduction to the Incident Command System
	IS-200	Basic Incident Command System for Initial Response
	IS-700	An Introduction to the National Incident Management System
	IS-800	National Response Framework, An Introduction
Professional Development Series	IS-120	An Introduction to Exercises
	IS-230	Fundamentals of Emergency Management
	IS-235	Emergency Planning
	IS-240	Leadership and Influence
	IS-241	Decision Making and Problem Solving
	IS-242	Effective Communication
Advanced ICS	G-0191	Emergency Operations Center/ICS Interface
	IS-2200	Basic Emergency Operations Center Functions
	ICS 300	Intermediate ICS for Expanding Incidents
	ICS 400	Advanced ICS

## Recommended Training

The following courses are **not** required for full PTB completion, but are recommended to enhance your understanding of this position:

CATEGORY	CODE	TITLE
Position Specific	E/L 973	NIMS ICS All-Hazards Position Specific, Finance Admin Section Chief

**Task Completion Codes**

- (C) – Task performed in a classroom or training setting.
- (E) – Task performed during full-scale exercise.
- (F) – Task performed during a functional exercise.
- (T) – Task performed during a tabletop exercise.
- (I) – Task performed during a real-life incident or event.
- (J) – Task performed during day-to-day job duties.
- (A) – Task may be endorsed at any time.

**Task Category: Perform action tracking**

TASK	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		

**Task Category: Order/request resources**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
3. Demonstrate understanding of various resource ordering/requesting procedures and requirements.	C, E, F, I, T		
4. Ensure that documentation aligns with reimbursement requirements: <ul style="list-style-type: none"> <li>• Document necessary approvals</li> </ul>	E, F, I, J		
5. Ensure that requests address the resources’ logistical needs.	E, F, I		
6. 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		
7. Transmit vertical resource requests, such as from local to state or from state to Federal.	E, F, I		
8. Update status of resource requests.	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p>9. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities:</p> <ul style="list-style-type: none"> <li>● Demonstrate general awareness of local risks and hazards</li> </ul>	C, E, F, I, T		
<p>10. Maintain positive, calm demeanor to promote a positive work environment.</p>	E, F, I		
<p>11. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.</p>	E, F, I, J		
<p>12. Comply with relevant health and safety requirements.</p>	E, F, I		
<p>13. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.</p>	C, E, F, I, T		
<p>14. Participate in the EOC planning process.</p>	E, F, I		
<p>15. Participate in appropriate EOC meetings and briefings related to your assigned function.</p>	E, F, I		
<p>16. Follow general internal and external information flow processes:</p> <ul style="list-style-type: none"> <li>● Demonstrate knowledge of information management systems, such as incident management software</li> </ul>	E, F, I		
<p>17. Manage essential elements of information and critical information requests in accordance with processes and procedures:</p> <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		
<p>18. Practice proper knowledge management processes and procedures:</p> <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		
<p>19. Follow processes for resource requests, prioritization, deployment, tracking, reassignment, and demobilization.</p>	E, F, I		
<p>20. Participate in orderly transition of resources and processes from response to recovery.</p>	E, F, I		
<p>21. Transfer responsibilities upon completion of assignment:</p> <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		
<p>22. Participate in EOC training and exercises.</p>	E, F		
<p>23. Participate in after action review and improvement planning.</p>	E, F, I, T		

**Task Category: Understand potential sources**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>24.</b> Demonstrate awareness of resource sources: <ul style="list-style-type: none"> <li>● For various disciplines</li> <li>● Regional, state, local, tribal, territorial, Federal, private sector, and nongovernmental organization (NGO) sources</li> <li>● Preapproved vendors and on-call contracts</li> </ul>	E, F, I, T		
<b>25.</b> Coordinate with resource acquisition personnel from other organizations to identify potential resources and gain better understanding of sourcing mechanisms.	E, F, I		
<b>26.</b> Prioritize the allocation of scarce resources.	E, F, I		
<b>27.</b> Demonstrate awareness of incident-specific fiscal and resource constraints.	E, F, I, T		
<b>28.</b> Identify options for fulfilling resource requirements or requests: <ul style="list-style-type: none"> <li>● Validate that options meet needs</li> <li>● Consider constraints</li> <li>● Consider support requirements</li> <li>● Estimate costs</li> </ul>	E, F, I		
<b>29.</b> Identify and communicate resource support requirements, such as lodging, feeding, fuel, power, and equipment operators.	E, F, I		
<b>30.</b> Develop courses of action for fulfilling resource requirements or requests, factoring in considerations such as: <ul style="list-style-type: none"> <li>● Incident needs and priorities</li> <li>● Logistical factors, such as transport, security, storage, and support requirements</li> <li>● Legal considerations</li> <li>● Financial factors/costs</li> <li>● Backfill requirements</li> <li>● Mutual aid, private sector, and Voluntary Organizations Active in Disaster (VOAD) capabilities</li> </ul>	E, F, I		
<b>31.</b> Determine the best option for fulfilling resource requirements.	E, F, I		
<b>32.</b> Facilitate the acquisition process based on chosen course of action.	E, F, I		
<b>33.</b> Notify appropriate personnel for resource fulfillment and information based on selected course of action: <ul style="list-style-type: none"> <li>● Close loop for requestor and report resource request status</li> </ul>	E, F, I		

**Task Category: Track resources**

<b>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<b>34.</b> Demonstrate knowledge of EOC and field operations resource tracking processes.	E, F, I, T		
<b>35.</b> Monitor and track resources and supporting logistics.	E, F, I		

36. Update requestor on request status, estimated time of arrival, and related logistical details: ● Verify that provided information meets incident needs	E, F, I		
37. Establish communication channels to maintain resource status.	E, F, I		
38. Track resources from initial request through: ● Hand-off to incident, or Demobilization (for resources that remain under EOC management)	E, F, I		
39. Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.	E, F, I		
40. Communicate with incident command and EOC stakeholders regarding resource status.	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
41. Demonstrate knowledge of jurisdictional/organizational procurement policies: ● Standard operations ● Emergency operations ● Cost-tracking processes and requirements: ○ Preapproved vendors ○ On-call contracts	E, F, I, J		
42. Demonstrate awareness of fiscal implications and requirements when: ● Requesting or activating resources ● Operating under various types of emergency or disaster declarations ● Receiving external, Federal, or state assistance ● Using volunteer resources	E, F, I, J, T		
43. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
44. Seek information on the financial requirements of incoming resources, such as: ● National Guard assets ● Mutual aid resources	E, F, I		
45. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
46. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

<p><b>47.</b> Collect, track, and document data related to funding and expenses:</p> <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		
<p><b>48.</b> Coordinate with organizational representatives to identify additional discipline-specific funding sources.</p>	E, F, I, J		
<p><b>49.</b> Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources:</p> <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**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
<p><b>50.</b> Review resource requests with resource management personnel to verify understanding of request and provide input on course of action:</p> <ul style="list-style-type: none"> <li>● Suggest cost-efficient alternatives to obtaining requested resources, as appropriate</li> </ul>	E, F, I		
<p><b>51.</b> Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.</p>	E, F, I		
<p><b>52.</b> Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.</p>	E, F, I		
<p><b>53.</b> Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.</p>	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE

54. 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		
55. 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		
56. 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		
57. 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		
58. Help develop strategies and tasks to support the goals and objectives of incident command or the EOC.	E, F, I		
59. Obtain relevant information for operational decisions.	E, F, I		
60. Guide personnel as they identify and address gaps in critical information.	E, F, I		
61. Establish metrics and benchmarks for program performance and monitor progress through completion.	E, F, I, J		
62. Monitor and manage stakeholder expectations: <ul style="list-style-type: none"> <li>● Communicate policy, process, and procedural changes</li> </ul>	E, F, I		
63. Order and organize resources to achieve objectives: <ul style="list-style-type: none"> <li>● Understand constraints and limitations</li> </ul>	E, F, I, J		
64. 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		
65. 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**

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
66. Use leadership styles appropriate to the situation.	E, F, I		
67. Establish and communicate processes and procedures.	E, F, I		
68. Assign tasks and clearly communicate expectations.	E, F, I		
69. Emphasize and foster teamwork.	E, F, I		



<p><b>70. Manage conflict and coordinate problem-solving:</b></p> <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		
<p><b>71. Prepare and discuss feedback with subordinates:</b></p> <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		
<p><b>72. Support the health, safety, and welfare of assigned personnel:</b></p> <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>TASK</b>	<b>CODE</b>	<b>EVALUATION RECORD #</b>	<b>EVALUATOR INITIALS AND DATE</b>
<p><b>73. Establish and maintain positive interpersonal and interorganizational working relationships.</b></p>	E, F, I, J		
<p><b>74. Demonstrate ability to influence others outside your chain of command.</b></p>	E, F, I, J		
<p><b>75. Ensure staff activities align with the EOC's operational rhythm.</b></p>	E, F, I		