

Incident Business Practices Working Team
August 31 – September 1, 2004
Missoula, Montana

Attendees:

Hallie Locklear – Chair/BLM
Veronica Belton – BLM
Emmy Ibison – FS
Tony Recker – BIA
Rosie Morin – BIA
Debra Ledford – NPS
Deb Aiken – FWS
Paul Palmiotto – State of Florida
Dave Behrens – State of Arizona
Steve Hasenorhl – State of South Dakota
Dugger Hughes – Coordination Center Manager
Sarah Fisher – FS

****** Items bolded and highlighted in blue require action.**

Tuesday, August 31, 2004

Introductions were made with the announcement of several new members to the working team:

- ◆ Rosie Morin is replacing Tony Recker as the BIA rep.
- ◆ Steve Hasenorhl is replacing Dave Behrens as the Western States rep.
- ◆ Dugger Hughes is replacing Randy Hart as the representative for the Coordination Center rep. Randy will continue with the working team as a Line Officer rep.

May IBPWT meeting notes were accepted.

Reviewed the Action Item Log. Changes made accordingly on the log.

ROSS Crosswalk and Position Code List

Want to compare ROSS list with AD Pay Plan to ensure positions are not lost and that changes are reflected yearly in the AD Pay Plan. Hallie has appointed Cheryl Molis as the IBPWT rep on the DAWG – dealing with position code listing.

- **Hallie will get with her to find out where we can access the listing on a regular basis when developing the AD Pay Plan and to ensure we understand the process.**

Kristy Felty will take the lead on the 2005 Pay Plan development for the BLM. She will work with Tina Ledger. The Pay Plan will be released by January 1, 2005.

- **Emmy will follow-up with the FS Directives people to find out if the AD Pay Plan needs to continue to go through the regular directives process.**

Communication Plan for 2005 AD Pay Plan

Direction has not been given to this group as of yet.

History of the AD Pay Plan Task Groups:

- A task group was established in 2002 to determine if we were utilizing the pay plan within our authority. This ever got off the ground. Next, a second task group was established to look at rates of positions and determine if positions are classified correctly. This task group leveled the positions using PTBs, training materials, SMEs, classification specialists, etc. Rates have not been established and assigned yet to those levels. A third task group was established in May 2004 to do that (Deb Rigden & Gary Wilson.)
- The intent of the communication plan is an attempt to advertise the changes made ahead of time and provide a buffer to the field.
- **Hallie will contact Randy Eardley/DOI and Rose Davis/FS and let them know we are not yet in a position yet to give them the information they need to get started.**

Template for Mutual Aid Agreement

Paul presented the work that he and Dave had done on the template. The template will be finalized from Tom Kuntz's comments and will be sent to Mark Gress to review before sending to NWCG.

- Mark's comments will be sent to Dave and Paul to discuss with Tom Kuntz. The product will then be finalized for the NWCG meeting in October.
- **Dave will call Tom, let him know we are okay with the changes so far and we are sending to a federal contractor to review before finalizing for NWCG.**
- **Hallie will recommend NWCG forward the draft to legal counsel for review prior to making the draft final.**

Charter Review

The working team discussed the make-up of the group and what would be most effective. The charter will be amended to show 12 members, with the rationale of trying to bring in a northeast state representative and allow for flexibility. Currently there are 10 voting members on the team.

- Hallie will present to NWCG at their October meeting for signature and approval. (Need to get signed copy posted on the web, once it is complete.)
- **Dave knows of someone in the Northeast who may be a possible candidate and will have him contact Don Artley. Paul will assist in looking for a candidate if this does not work out.**
- **Hallie will check with other working teams to see what their numbers are before we amend the charter. Sarah will amend the charter.**

EFF Datamart Query

Emmy got info from Tina re: AD Pay Plan use program review. Initially planned to do a full-blown audit, sampling, etc. however, through an initial sample, the FS realizes that we already know what the issues are. FS is in midst of consolidating B&F in ABQ. Tina is running reports on \$\$\$ spent to train ADs. FS has spent 1.8 million to train

ADs. Getting break down by unit to look at issuing direction. Some legitimate, some not. Hope to have issues and recommendations by end of fiscal year from Tina's group.

- Tina's ideas – look into reimbursing casuals for travel through the OF-288; pay all casuals going to training at AD-1 level (perhaps only pay for positions that are required and only pay when employee is fully qualified to attend. Not good direction for authorizing training and attending team meetings, etc.)

AD Pay Plan Verbiage Task Group

Might be better to put a small group together for revising and adding language so we get buyoff from everyone. Deadline needs to be sometime in November so it can be reviewed and tentatively approved by 12/1/04. **Emmy will follow-up about directives process.**

- BLM – Kristi Felty
- BIA – Tony Recker (liaison & team leader)
- FS – Tina Ledger
- NPS – Teresa Wright??? (Debra will contact)
- FWS – Angie Larsen

Need draft product to IBPWT by 10/15/04 (target). Will merge together verbiage for new rate pay band information if it is completed in time. **Hallie will work on a charter this week to get it in place before end of the week. Tony will finish the charter (exclude prescribed fire from FS pay plan and DOI can add after complete.) Hallie will send historic info to Tony.**

AD Pay Plan Rates

- Letter from Director FAM to Dir HRM to say tell us who is going to do this by 9/3/04.
- If no response by 9/3/04, DOI will take the lead of the task group.

National EERA/Contract Database

Need a national EERA/Contract database that is able to interface with ROSS. Mary Ann's incident automation group working on this too.

- DOI acquisition people will be meeting with Mark Gress, Andy Smith, and Hallie to discuss the DOI use of ICARS.

ISUITE Update

Phase One

- Training for 2004 completed
- Contract for stabilization awarded
- Help desk functioning
- Project plan submitted to PMO for review

Phase Two

- Project Plan development initiated and submission to PMO by 11/1/04.
- NWCG recently approved phase two.

Feedback Needed

- Question has been raised re: the use of electronic signatures on OF-288's. All working team reps agree that we do not support electronic signature and teams cannot modify the program to provide electronic signature. Right now there is not the capability to provide passwords, security, and ensure validity of electronic signatures. Not appropriate until system is developed where it is secure enough to ensure authorized use.
- Request was made to add a THSP to list for Software Application Support Person. Can this be fulfilled by the CTSP? Is there a significant difference between these two positions? **Hallie will check with Mary Ann.** Software personnel should be under contract already. We should not be hiring an AD to touch software.

FS Accrual Process

In April, Ginny put out a message to Hank Kashdan to get DOI agencies to assist with accrual process for daily reporting. Hallie let Ginny know that the best tool would be to approach each agency individually. We could post a link on our website with the accrual processes. Hallie got a letter from Hank asking her to direct agencies to report these accruals. Hallie responded that IBPWT is not the conduit and he must go to the agencies and ask their assistance.

OGC Review process & AD questions

FS is looking for answers for using state and local government on incidents and liabilities and legalities associated. Found some of this applies to ADs as well. Can ADs perform these kinds of tasks? Are they covered? Are they considered a government employee? What are our authorities? Letter is almost ready to send to OGC. Will probably get an informal opinion initially but will be a while before we get an official of answers.

Also developing a white paper re: state and local governments and Delegations of Authority. Don't think it is a huge issue as long as AA is still providing guidance. Will probably have to cite specific authorities to allow for delegations, etc. May have to create standard language for DOAs.

Won't be able to definitively say what ADs can or cannot do for 2005.

TASK GROUP UPDATES

IBA Task Group – Veronica

Randy and Hallie will be in attendance at the IOSWT and Tory will conference call in. Need to touch on why we need Type 1 & Type 2 levels and where we think it should fall in the 310-1.

Details of the Proposal:

- Propose to eliminate IBA3 as position code and use as an agency (local unit) technical specialist.
- Require IBA training for both levels.
- Look at some kind of complexity level analysis for the 1&2 to help people determine what level to order and validate both levels.

- IBA Guide would be replaced by 310-1, PTB, and the supplement tool kit information for the IIBMh and Red Book. (Could also add information to the AA guide that is given during Fire Management Leadership)

Goal

- PTB to be adopted on 10/20/04 by IOSWT.
 - PTB and 310-1 write-up will go to agency reps for review on 9/20/04. Comments due by 10/04/04. Should be reviewed by training/qual folks as well as business people. A briefing paper will be prepared for IOSWT to read ahead of time.
- Have working team comments on the PTB back to Sarah by 9/10/04.

Rental Vehicle Task Group – Dave

- Three areas are being considered ... nationwide contract, local/regional contract, exploring options with GSA,
- Conference call is scheduled for 10/13/04 at 11am MDT 602/542-9008
- Need to determine the positions and vehicle needs of IMTs. Will be part of their final recommendation.
- Hallie has a signed charter.
- Dave will continue as the liaison.

COTR Task Group – Deb

- Meeting will be held on 11/15/04 in San Diego.
- Working diligently and right on task.
- Need to get a signed copy of the charter.

Fuel & Oil Task Group – Debra

- No report as of yet.
- Need to get a signed copy of the charter.
- Debra will contact team members to make sure they are all still willing to participate.

Team Financial Summary Task Group – Emmy

- David Summer has been assigned.
- Work is in process.
- Need to get a signed copy of the charter.

Other Hiring Authorities Task Group – Hallie

- Liz Kinney is new leader.
- Still need a BIA rep (or an HR rep).
- Perhaps Winfred Hooker would be willing to join this group.
- Need to get a signed copy of the charter.

IBA Qualification Process

Discussed the process for how IBA applications will be reviewed.

- Completed application is submitted to Sarah/Hallie.
- Application then forwarded to SME on WT to review.
- Report back to Hallie with recommendation on qualification level. (Individuals must be qualified/evaluated by a fully qualified IBA.)
- Will continue with current 1,2,3 level qualification for now until PTB is adopted in October.

Website Feedback

New web page design was discussed with the working team.

- Color looks good; use the format with the same colored side boxes (don't alternate boxes between different colors.)
- Plain background looks good (don't put the trees on it).
- Would be helpful to add a drop down box of all the teams for instant link on the Working Teams button on the top line.
- IIBMH will have a sublink to the regional supplements.
- Need to have some sort of descriptor line of when the IIBMH is updated. And perhaps a comment link on the IIBMH would be handy as well.
- Add more descriptor lines ... what the IBPWT is, does, etc.

Dates and Locations for Upcoming Meetings

- January 19 & 20, San Diego, CA – Hallie coordinator
- May 10-12, Fairbanks, AK – Veronica coordinator
- October 18-20, Charlotte, NC – Debra coordinator
- January 2006 – Florida – Paul coordinator (or February)

All Risk Matrix

Reviewed the All Risk Matrix provided to the team by Tory.

- Might be more helpful to have examples under each item of generic business issues we will have to contend with. Needs to be more specific.
- Should be a guiding tool for asking questions and seeking information, providing a list of items to consider when developing policy and/or direction.
- Chapter 90 – Could be a mini IIBMH that touches on each chapter's issues that might apply to all-risk ... what authority are you tasked under and what authorities apply under that tasking. Give you a list of questions to ask when tasked to all-risk assignment.
- **Dugger will prepare a draft response back to Tory.**

Wednesday, September 1, 2004

EERA Task Group Update – Kermit Johnson

General clauses of EERA OF-294

- Completed a rewrite of clauses.

- Created 5 additional clauses (additional requirements to implement ... firearm weapons, work/rest policy, harassment free workplace, expanded definitions clause, commercial motor vehicle clause)
- Decided it would be best not to put FAR clauses on form because the FAR is update yearly. Make reference to them and provide them as an attachment.
- Kermit became a member of FS Efficiency team in Jan 2004 – big push for consistency with method of payment due to geographic areas with different types of rates. Had to modify the payment clause to accommodate this.
- Augmented the front of form to deal with single shift/double shift capabilities.
- Changes will probably affect the Use Invoice OF-286 and the Shift Ticket OF-297.
- A new task group will create the front of the EERA and the other forms affected (invoice and shift ticket).
- Will review all forms (inspection on up) to consider modifications.
- FS Efficiency group created a format for consistent development of geographic rates. All areas will have different rates but they will be based on the same methodology.
- **Kermit will create a final product (EERA and geographic rate methodology) and send to EERA Group and FS Efficiency Group for review and then final package to IBPWT within next couple of weeks (estimated date of 10/1/04).** (Will also send copy to the new task group, as they will need the clauses to know how to proceed with the front of the form.)
- Kermit is also working with the FS payment group out of Ogden because people do not understand how to use single shift/double shift.
- Finalized the Land Use Agreement – tested this summer, found a few weaknesses and Kermit will discuss with FS Efficiency group.
- Just a side note – OIG is in the process of reviewing the EERA use process.

OF-288 and changes with I-Suite

In addition to the ISUITE update issues, the working team decided on the following appropriate change to ITS for printing of OF-288s:

- Blank out column heading if nothing has changed in the individual's assignment. This will eliminate the need for signatures in every block.
- IBPWT needs to bring any additional concerns or issues that are raised to Emmy to share with Tina.

S&HWT and OTC Drugs and Vitamins

IBPWT recently asked for standardized list from S&HWT. S&HWT responded with their charter of EMSG to develop the process of credentialing EMTs and recommending appropriate levels of care for EMS on incidents. S&HWT is not comfortable making any recommendations re: OTC Drugs and Vitamins until a report is back to them from the EMSG. In the meantime:

- Some agencies are starting to research their authorities to purchase these items and may provide specific direction on their own.
- IBPWT agrees to S&HWT request and will respond appropriately (we will remain silent until EMSG study is complete) but each agency may make a

decision on their own. **Paul Palmiotto will draft a letter back to Paul Broyles, stating the IBPWT position.**

- Once the study is done, the recommendation for policy will come from S&HWT to NWCG and agencies will have to decide if they are willing to implement what NWCG is recommending.

Develop Criteria for duties an AD should or should not be performing

- Cannot work on until we have a determination from OGC.

PROC Concern and 310-1

- Recommendation of a series of procurement positions
- Changes to PROC and new suggestion recommendations.

310-1 Revision Process

- IOSWT requesting to review 310-1
- IBPWT still feels that S-260 and S-261 should be a requirement for single resource bosses, unit leader level and higher, and all finance positions. Perhaps we could look at packaging the course as distance learning, which might appease the states a little more. (The course used to be self-paced and agencies decided in 2000 that they were not able to provide enough oversight with this process.)
- Perhaps FWS could explore the cost of web-based program through Joette Borzick at Sheperdstown, WV so we will have a better idea if this is feasible. (260 group was quoted ~\$250,000 originally.)
- **Paul will keep a rough idea of the cost associated to put on the next beta course so we can compare it to web-based costs.**
- IOS request mentions 4 groups in 310-1 including Incident Support which is where Buying Team, etc positions would go. They would have to go through the same process we have had to go through with the IBA position, i.e., PTB development, 310-1 write-up, NWCG adopted course material.
- **IBPWT will go back to Mary Ann and ask if they want to go forward with the same process to pursue through IOS.**
- **Hallie will also question IOS at October meeting on their responsiveness to additional positions.**
- **Sarah will send the IBA Draft PTB and the blank template to Emmy.**

Hazard Pay Issue

- FS has issued direction on the appropriate use of hazard pay and who is and isn't entitled.
- DOI discussion with Winfred Hooker – Should the DOI put out the same direction? Hook feels it appears FS is right on the mark. Email sent to Wally Josephson – OWFC to take a stand. Direction should come from the department level. Would be easier for the DOI to put out direction now because FS has already done the research, etc. **Hook is working on this right now and will be in contact with Hallie.**

- FS background on the issue is that the Union got involved because they thought people were not treated fairly. Needed something black & white to make a determination of entitlement so the use of the IAP is what is accepted.

Alcohol During Demob Issue

- Broyles approached about a concern within NMAC and NWCG about concerns with alcohol during demob. (Specifically Midewin)
- Fit for duty issue and we cannot control what they do if they are fit for duty and if they are off the clock.
- Just for discussion ... no follow-up required.

Property Loss or Damage Report OF-289

There is still a need for this form on incidents.

- **Sarah will research with GSA if we can get the form electronically and post to the website or a link to the GSA site where people can access the form and print it out.**

Firefighter Time Report – OF-288 Revision

Several issues were discussed re: the use of the current OF-288:

- Signature issue, firefighter classification block (very necessary with ADs), duplication of information, are we capturing the information that EFF Pay needs for processing, incorporating behavior rules (add signature line to conditions of hire), do we need to phase out the old carbon copies?

IBPWT agreed we should establish a new Task Group to review the issues and perhaps develop a new form.

- Task group should include TIME & finance field folks, EFF pay folks, ISUITE people, regular government folks (home units making payments, etc).
- Expectations for OF-288 Task Group:
 - Coordinate with other working groups and task groups ... ISUITE (Mary Ann Szymoniak), EFF Pay User Group (Tina Ledger), PMS Group (Cindy Wolf), Payment Team personnel, Casual Pay Specialists, Agency HR Personnel for validation.
 - Determine if proposed changes from above groups require modification of the current OF-288. (Do we need to modify at all?)
 - Units to consider for comment – TIME, agencies hiring crews & single resources, home unit business personnel, etc
 - Review the conditions of hire for updates, modifications, additions, deletions, etc. (Do we need a separate form or forms?)
 - Group needs to consider hiring requirements in IIBMH, payment process requirements, administrative process of time reporting and time recording.

Progress Report – January meeting

Proposal Due (Draft Form, other recommendations) – May meeting

Task Group Members:

BIA – Rosie Morin – Team Liaison

FS – Sarah Fisher – Team Lead (TIME, ITS Background)

BLM – Shana Miller (Casual Pay Specialist)
BIA– Roger Jensen (crew hiring)
NPS – Rebecca Thomas (Payment Team)
FWS – Cindy Weakland (home unit and regular agency employee timekeeping)
State – Betty Daniel, State of Florida (FSC, ISUITE instructor)
EFF Pay Specialist – Tina Ledger (SME)
ISUITE – Mary Ann Szymoniak (SME)

Review of Tasking Process for establishing IBPWT Task Groups

- Liaison develops a charter.
- IBPWT rep will contact agency personnel suggested to see if they are willing and available to participate and let the Team Lead know if they are available.
- Chair sends charter and tasking letter to Task Group Lead.
- Team Lead should contact Chair with concurrence of group and signed charter.
- Task group liaisons need to communicate IBPWT meeting schedule to group lead to prepare for progress report presentations.

Agency Updates

BLM

- Issued memo of approval to hire THSP at AD-5 level done through GACC & NWCCG process. Need to reissue for Francis with appropriate cost structure.
- Revision to incident time keeping memo. Applying overtime act, posting commissary, etc. DOI going to financial system and BLM implementing 10/1/05.
- Centralized payments – EFF Vendor pay going away in January, briefing 9/10 to approach directors re: centralized payment center for all DOI vendors. Shared finance system – DOI looking at doing more centralization in common practices.
- Director of Budget and Evaluation – Andy Smith transferring to state office. GS-14 job opportunity available
- Carol Salo moved from NM to ID State Office. Shana Miller moving to NM in Carol's position from Las Vegas Field Office.
- Hallie continues to sponsor and host monthly business calls for the BLM.

BIA

- Working hard to get agency and regional people more involved. Held an April workshop and have four more this fall to train AA's, admin folks, crew reps, FMO's, etc. Help people understand their roles and responsibilities.
- Trying to clean-up AD authority use.
- Lots of policy memos with driving policy – have to have a valid government and state driver's license to drive. Tribes as well government employees having to comply.
- Try to charter a BIA Business working team to work on policy stuff to supplement the manual, get the information to the agency's and tribes, etc. and to keep them involved.

- Going through reorganization – become more centralized. Fiscal folks answer to WO, not to regional directors. Contracting is the same thing.
- Creation of Department Superintendent for Trust – not funded by congress but putting the positions in place. Budgets not spent by 7/1 are taken to cover shortages in other areas.
- Lyle Carlile is the new Director. Advertised a deputy position to oversee budget and admin.

FS

- Kathy Shelton got the R6 IAC job (vice Paul Rose).
- Not going to be very prepared to deal with incidents at the home units when we go to a centralized payment center. The personnel will not be located at the individual units to provide support.
- Same for IT folks and support, telecommunications folks, etc.
- National caterers are now on EERAs not national contracts. (2004 contract considered null & void.) Now they are all considered CWN. Plan to let contracts again for 2005.

NPS

- New vendor pay will be on FPPS effective January 1, 2005
- NPS Payment Teams will be given authorization to do input into FPPS program. APTs will be able to access FFS and make payments directly to the vendors. APTs will not go away. All vendors will have to be on CCR and into pay program on CCR table and vendor table.
- Travel restrictions limited contacts and information sharing this year.
- New travel manager on-line and direct pay.

FWS

- Centralized payment center meeting this month.
- EFF payment training will hold off until the results of centralized payment center meeting.
- Regional Fire Managers meeting next month in Tucson.
- Creating a FWS Fire Business Management Handbook section.
- Rewriting about 75% of the position descriptions for the branch.
- Vacancies: GS-13/14 Budget Analyst; GS-12 Safety Analyst, Training Assistant.
- Issues get directed to Hallie still.

Eastern States

- Hurricane Charley, State EOC collapsed and could not get done what they needed. Paul gave the working team a run down of what happened and how the state responded.
- Beta course will be put on for S-260 rewrite at the end of October.
- Paul gets a new job 10/1/04.

Western States

- South Dakota – second season for new dispatch center, struggle with EERAs, incident supply plans, etc. to combine state and FS center
- SD has new attorney with marching orders to look at contracts very closely, looking closely at VFD contracts and liability issues
- Alaska on fire.
- Arizona – governor promoted Kirk Rowdabaugh as State Forester. Change names back to the Forestry Division (from Fire Management Division); legislature promoted a lot of money to the division, 9 more inmate crews, 12 supervisors, 3 deputies (fire, grants and forestry, administration).
- Western state meeting in spring.

Coordination Center

- ROSS – major update with new servers in May, seems to be doing just fine. Slow year, not tested real hard. IQCS tied in now.
- Air tanker shut down and election year made it a very political fire year. DCs are done and will not be back.
- SW had a normal fire season; AK took a beating, everyone else fairly slow.
- FireCode working fairly well from the dispatch side. (Fiscal side has made it harder to track. Fiscal folks have to match up what is in FireCode).
- Dealt with contractor issue local vs. the one who lives in one state but has equipment in this state, etc. Interpreted differently by Expanded Dispatch. Difficult to hire folks.
- Problems with CDF folks refusing to do anything but 24-hour assignments. Sent IARRs.
- Type 2 crews were not utilized nearly as much this year.