Northern Rockies Finance and Logistics Evaluation

Updated 2017

The Finance –Logistics Evaluation includes overall performance of the Finance section and administrative performance of the Logistics section’s handling of un-operated equipment and other duties that impact finance or incident cost. The evaluation should be completed no later than 90 days following close-out with the IMT and after payment packages have been processed and paid. Agency Administrators should coordinate with their respective incident business personnel to ensure that fair and accurate information is provided to the IMT.

Incident Name:

Incident Management Team:

IMT Dates:

Finance Section Chief(s):

Logistics Section Chief(s):

Evaluator(s):

# Finance Section

1. Was the Finance Section following and familiar with the:

YES  NO Interagency Incident Business Management Handbook?

YES  NO NRCG Supplements?

YES  NO Host Incident Agency’s Incident Business Operating Guidelines?

YES  NO Was Finance Section familiar with current contract administration?

Additional Comments:

1. Host Incident Agency’s fiscal expectations of Finance Section:

YES  NO Were expectations for overall final finance package identified?

YES  NO Did Finance Section communicate issues during the fire?

YES  NO Did Finance Section utilize any additional assistance or personnel from the local unit (if available)?

YES  NO Was the Agency Administrator apprised of daily costs as requested?

YES  NO Apprised of daily cost share portions as requested?

Additional comments:

1. Forest Service Specific:

YES  NO Were accruals initiated and uploaded within 72 hours (if initial IMT)?

YES  NO Were accruals reviewed daily by Cost Unit for errors prior to finalizing?

YES  NO Were accruals finalized & uploaded/faxed daily to ASC?

YES  NO Was Forest Service AD travel completed on the OF-288 as directed in the Forest Service AD Pay Plan?

Additional comments:

1. OWCP/Claims:

YES  NO Was OWCP handled in accordance with the injured employee’s employment agency direction?

YES  NO Were Claims handled in accordance with agency policy and processes as identified in the IIBMH?

Additional comments:

1. Auditing and Package Review:

YES  NO Was auditing expectations of personnel/equipment time identified?

YES  NO Did host incident agency request to spot audit of finance package?

YES  NO Were audits conducted on Personnel time by host incident agency?

Full audit or  Random sampling?

YES  NO Were audits conducted on Equipment time by the incident agency?

Full audit or  Random sampling?

Findings – Personnel Time:

Findings – Equipment Time:

# Logistics Section

1. Contract Administration and Equipment tracking:

YES  NO Did Logistics section understand current contract administration of un-operated equipment such as rental vehicles or portable toilets?

YES  NO Was un-operated equipment being accurately tracked?

YES  NO Rental Vehicles tracked?

YES  NO If rental vehicles were reassigned, was the paperwork in order to close the current invoice and alert the vendor of the new incident location?

YES  NO Portable toilets /hand-wash stations accurately tracked and documented?

YES  NO Were shift tickets completed correctly for un-operated equipment?

YES  NO Were release inspections done in accordance with the terms and conditions of the agreement?

Additional comments:

1. Other Logistics Section duties:

YES  NO Were land use agreements in place, properly documented, and final inspections completed at end of incident; or was a plan in place to have them closed by the host agency?

YES  NO Were utilities (phone lines, DSL lines, satellite service, trash removal, and dumpster rental) disconnected or discontinued or was a plan in place to have them disconnected or discontinued by the host agency after the team’s departure?

YES  NO Did the supply unit return items to the appropriate caches and leave records behind?

YES  NO Did they indicate a problem with lost, damaged or destroyed items that cannot or will not be returned?

YES  NO Was accountable property appropriately tracked and returned to the host agency?

YES  NO Was follow up required and completed with the Finance Section?

Additional comments:

# Closeout

Finance

YES  NO Were follow-up or unresolved contract or personnel issues identified?

YES  NO Were follow up issues resolved during closeout?

YES  NO Were follow-up or unresolved OWCP issues identified?

YES  NO Were follow-up or unresolved claims issues identified?

YES  NO Were EFF/AD/Casual timesheets completed and closed out according to employing agency guidelines?

YES  NO Were Cooperators’ paperwork completed in accordance with the terms of their agreements; were they given the proper documentation (i.e. original paperwork) at time of demob?

Any additional comments:

Follow up after Closeout

YES  NO Is any follow up required with the Finance Section?

YES  NO Is any follow up required with the Logistics Section?

Any additional comments, information, accolades or concerns:

Completed By:

Name:

Date:

Email:

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Route to:

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\*also cc the applicable agency Incident Business Coordinator