

Future Concept  
Intent-Based Position Task Book

Evaluator Guide



For the PTB Beta version (OSC3)

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# MCS

Mission-Centered Solutions



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# Intent of PTB Process

The PTB process is the culmination of a broader training system for developing people to serve in a specific position for an incident management team (IMT). Its intent is to assure that candidates reflect the ethos of the culture and demonstrate competency in technical, leadership, and teamwork aspects of the position.

As a reflection of the more compliance and rules based culture of the past, task books have done a relatively good job at evaluating, and thus reinforcing, the procedural and system-related components of the position. PTBs have struggled with assessing the leadership and teamwork aspects of integrated performance. The cognitive focus reflected the emphasis that existed in command and general staff training on compliance with process. The analysis, critical thinking and interpersonal skills were alluded to but not emphasized in a clear and doctrinal way.

As response organizations become more intent-based, the PTB system needs to change to reflect and reinforce this evolution. This PTB captures those additional tasks. The inclusion of intent and success conditions for each competency area defines the standards by which performance is to be measured.

PTBs are designed to be used by any individual (trainee) who is working towards being certified under the National Incident Management System (NIMS). PTBs are intended to be used to document successful completion of tasks specific to an Incident Command System (ICS) position. The purpose of the documentation is to help build a portfolio of evidence that the trainee has demonstrated each core competency and possesses sufficient ability to perform the job.

Trainees are evaluated during this process by qualified evaluators, and the trainee's performance is documented in the PTB. An Evaluation Record will be completed by all evaluators documenting the trainee's progress after each evaluation opportunity.

## End State

A trainee whose competency for a given position has been comprehensively evaluated and documented so that an approving entity can make an informed decision regarding the individual's fitness for certification.

## Purpose

IMT members' decisions can have life or death consequences. The intent-based PTB reflects the proper degree of rigor needed in the evaluation process to ensure trainees are ready for the demands of the job.

Successful performance of all tasks, as observed and recorded by an evaluator, will result in a recommendation to the trainee's Authority Having Jurisdiction (AHJ), that the trainee be certified in that position. Evaluation and confirmation of the trainee's performance while completing all tasks will normally require more than one training assignment and several different evaluators. Incidents lasting several days may involve multiple evaluators. Tasks may be evaluated on incidents, in a classroom simulation, in training, Homeland Security Exercise & Evaluation Program (HSEEP) compliant functional and full scale exercises and exercises and in other appropriate situations when there is a qualified evaluator present.

It is important performances be critically evaluated and accurately recorded by each evaluator. All tasks must be evaluated before a trainee may be certified.

## Task

Evaluate the experience of a trainee in suitable on-the-job, training, exercise, and incident environments.

Document performance. The narrative spaces in the PTB provide the trainee with constructive feedback on strengths to sustain and areas needing improvement.

Mentor trainees by providing constructive feedback to the trainee.

## Success Conditions of an Effective Evaluation

- The PTB was an effective basis for communicating evaluator expectations to the trainee.
- The PTB accurately logged trainee performance observed by each evaluator.
- Evaluator feedback was primarily objective, focused on behavior seen or heard during evaluated events.
- Evaluator used verbal feedback respectfully to mentor trainee in sustaining or improving performance.
- Recommendations (sign-offs) and written notes fully support a case for approving or not approving the trainee to be certified to serve in the position.
- Evaluator engaged in appropriate interventions with constructive feedback and follow up expectations.

## Your Role as Evaluator with this Intent-Based Position Task Book

What is different from before about your role as an evaluator within an intent-based PTB system? The PTB system already relies on centralized planning and decentralized execution. As an evaluator, you operate with little to no supervision in the field, and the standards entity must trust you're upholding the standards as an effective gate keeper.

It's well known that members of incident management teams routinely make decisions that affect people in harm's way and have potentially life or death consequences. The bar on the gate should be fairly high, yet historically that gate has been left half open, allowing many to slip through who were really not ready.

Many have blamed poor evaluators, but that is not the true inherent weakness in the system. Past PTBs have done a good job listing the process oriented tasks, but have done poorly at articulating the conditions and standards needed to ensure the task is performed to the desired level. Critical thinking, teamwork and communication tasks have been underrepresented in previous PTBs.

A "Yes/No" did she or did she not "Conduct a Briefing", with no criterion of performance has left a generation of trainees and evaluators frustrated as it is left to each evaluator to judge performance subjectively based on their own experience. Open and honest performance feedback is very difficult under these conditions.

With the full inclusion of all the elements of leader's intent (task, purpose, end state) and their success conditions – and the addition of the critical thinking and team tasks – the evaluator is armed with the chain and lock to be a more effective gate keeper.

Evaluators can now focus on specific behaviors, "Here is what I saw – Here is what I heard" and compare them to more meaningful criteria of what right looks like and provide far more objective and specific feedback to the trainee.

You initiate your role by opening a two-way conversation with your trainee to clearly communicate the expectations of their performance. That dialog is ongoing as you evaluate and provide mentoring feedback on the trainee's behavior relative to the tasks and their success conditions throughout the event. You should be well armed with the tools needed to provide meaningful written and verbal feedback to document the trainee's experience and have the difficult conversations when necessary for the times performance is below the standards expected.

## List of Applicable Terms

Evaluation Event	An event such as an incident or training exercise or similar opportunity in which the trainee is evaluated.
Competency	Big muscle groups of mission essential task areas. They are arranged in the task book to sequentially mirror the arc of an incident. “One of the essential capabilities [skills, proficiencies] the trainee must satisfactorily demonstrate to be recognized as being ready to accept the responsibility of the position.”
Evaluation 1, 2, 3	Narrative summary of observed performance over course of evaluation event.
Recommendation for approval	Signature indicating that the evaluator recommends that the trainee be approved for the position. Trainer’s signature indicating the trainee has performed all competencies satisfactorily and recommends the trainee be considered for certification”
Major Task	A substantial piece of work essential to demonstrating a core competency that may contain several sub-tasks.
Sub-task	A piece of work essential to demonstrating a task.
Competency summary	A narrative that synthesizes the observations during that evaluation event
Observation 1, 2, 3	A narrative recording the observed behavior regarding a task.

# Interstate Incident Management Team Qualifications System (IIMTQS) Guide

## Position Task Book (PTB)

The PTB may serve initially as the “lesson plan” for a trainee’s on-the-job or experiential training. As the trainee is capable of accomplishing tasks, the PTB serves as the official record documenting evaluation of the Trainees’ performance. Successful completion, as determined by a qualified evaluator(s), of all tasks required of a position is the basis for the final evaluation and recommendation that the Trainee be qualified by the Trainee’s local AHJ. It is recommended a Trainee complete a PTB on a minimum of two qualifying incidents, events, or qualifying exercises – one of which must be an incident.

## Qualifying Exercise

An exercise or simulation meeting the requirements contained in Section XIII, Qualifying Incident, Event, and Exercise Guidelines. Personnel filling incident management positions during an exercise meeting the requirements of a Qualifying Exercise may be able to use the exercise opportunity to complete tasks in their Position Task Books or meet currency requirement to maintain qualification. It is recommended that AHJ’s that sponsor these exercises consider using Homeland Security Exercise and Evaluation Program (HSEEP) guidelines.

## Qualifying Incident/Event

An incident or event that the AHJ determines meets the incident complexity, duration of time, and relevancy to the ICS position that is necessary to provide sufficient opportunity for the individual to exercise the roles and responsibilities of the ICS position they are filling. (Section XIII. Qualifying Incident, Event, and Exercise Guidelines)

## Evaluator

An Evaluator is an individual that is responsible for evaluating a Trainee using a position task book (PTB). The Evaluator must be qualified in the position they are evaluating or be qualified in a position that supervises that position in the ICS. States are encouraged to use evaluators qualified under U.S. Coast Guard, National Wildfire Coordinating Group and other Federal or State level qualification systems.

## Final Evaluator

The Evaluator who is signing the verification statement at the front of the PTB after all tasks have been completed and is recommending the trainee for certification. The Final Evaluator must be qualified and proficient in the position being evaluated. States are encouraged to use individuals qualified under U.S. Coast Guard, NWCG and other Federal or State level qualification systems.

# Evaluation Principles

The Trainees are evaluated in the context of a mission-driven culture, which is defined by a dedication to the following values:

- Service for the common good
- High trust state
- The pursuit of truth
- Form and function driven by the end state
- Individual initiative
- Continuous improvement

The positions for which the trainees are being evaluated exist to serve the common good in some way. The command climate and the organizational structures in which they operate rely on the other values to ensure that the organization and its response efforts are aligned with the mission. The evaluation of the performance of individuals in this context also aligns with these values.

## Service for the Common Good

Both the performance of the trainee and the subsequent feedback are ultimately directed towards this end.

## High Trust State

Professional, respectful evaluation climate/relationship. Evaluator and trainee have a common purpose to develop the trainee in the best way to serve the common good.

## Pursuit of Truth

At the very start of an evaluation, many evaluators are hesitant to provide honest feedback on opportunities to improve. The objective is to create an environment where, even with critical feedback, some of which is difficult to accept, that the support and respect is still there. Once trainees sense this, the vast majority will welcome the rare opportunity to receive an honest appraisal of their performance.

## Form and function driven by the end state

The evaluation process is performance based and structured for the job being evaluated. The evaluator focuses on behavior that can be observed or heard.

## Individual initiative

Evaluators exercise initiative to fit the circumstances. Give trainees the benefit of the doubt when they exercise initiative and make mistakes. Encourage trainees to exercise initiative and judgment.

## Continuous improvement

Evaluation of the trainee in the spirit of professional growth. Dialogue and mentoring to maximize learning. Specific written feedback to help the trainee understand expectations and their performance and concrete guidance to provide the trainee a clear path for improvement.

# Mentoring Performance Behavior

## Effective Feedback

Effective feedback is specific, not vague or abstract. It focuses on what can be seen and heard. It does not include judgements or assumptions about one's intentions, character, or competency. It is rooted in respect and is not designed to be confrontational and put people in a corner.

### Effective – Seen or Heard

*“During the stakeholder meeting, you spent almost the whole time looking at your phone and scrolling with your thumb. I talked to a couple of them afterwards and they said that how they took it was that you just didn't care about their input or concerns.”*

In this case, the evaluator is reporting only what she or he saw, and is not rendering her or his judgment, but is reporting what the stakeholders said about their perception of the trainee's behavior. This approach is less likely to provoke a defensive reaction, as it is harder to argue with one's actual behavior and words, or the reported perceptions of how others feel.

### Ineffective – Judgment on Behavior or Motivation

*“You were disrespectful during the stakeholder meeting.”*

In this case, the evaluator is not reflecting what they saw, but telling the trainee how they judged the trainee's behavior. It could simply be that the trainee's Mom just went into the hospital for cancer surgery and the trainee was trying to be respectful by not taking calls. In any event, this approach is far more likely to provoke a defensive response.

### Ineffective – Vague

*“You need to pay more attention in meetings.”*

This approach is too vague because it judges and arrives at a prescription without the trainee understanding what caused it and neither party understanding what contributed to the behavior in the first place.

In this case, the evaluator is not reflecting what they saw

# Understanding Response to Feedback

The term behavior describes how people conduct themselves. The behavior people is guided by their values and attitudes, which reside in the subconscious.

The relationship between attitude and behavior is complex. Values and attitudes overlap. Some behaviors are habits left over from previous attitudes that are now gone or forgotten. Other behaviors reflect deeply held beliefs.

When you consider the complex connections among values, attitude, and behavior, you can appreciate the idea that other people's behavior and attitude is outside of your control.

Understanding that you cannot change someone's attitude or behavior, however, does not mean that you cannot influence it.

Consider these common approaches to changing the behavior of others:

- Ordering--*You have to learn to listen!*
- Preaching--*You shouldn't get involved with that deputy...*
- Advising-- *I think you should go tell him to...*
- Using logic--*Don't you realize if you argued less...*
- Judging—*You don't care about their concerns, you need to...*
- Shaming--*You're too sloppy, you need to...*
- Analyzing--*You have a problem with authority.*
- Interrogating--*Why in the hell did you do it like that?*

Notice how many of these approaches use the word *you* in a punitive way. Most people dislike change, especially when being told they need to change by someone else. Being told to change because of not meeting a standard can start a type of psychological turf war. Potentially triggering subconscious defensive responses that can overwhelm the conscious understanding of the actual issue involved.

Historically, agencies have been effective at assessing people's ability to deal with the technical and tactical side of the emergency response, but they have been less adept at preparing and assessing people for the human and leadership side. This PTB process is intended to close that historical gap and assess performance in both the human and technical environments.

## Resistance Behaviors

When people are challenged by another person telling them how to behave, they can subconsciously react with a variety of *resistance behaviors*:

- Nervousness
- Too-easy agreement
- Insistence on arguing
- Withdrawal
- Attempts to shift blame
- Desire to quit

All these reactions mirror subconscious defensive mechanisms. They are not conscious behaviors. A person might even agree that they want to change, but the method of communicating automatically invokes a subconscious fight or flight response.

It is not that *you messages* provoke a battle over the needed change; but that they provoke a battle over who has the right to make the change. From an evaluator's perspective, *you messages* are an inefficient tool for trying to influence change in a person because you constantly fight the person's natural resistance to being told to change behavior.

## You Messages

*You messages* can directly impact the receiver's subconscious and trigger negative responses in a variety of ways:

- Convey blame
- Communicate a lack of respect
- Produce resistance, rather than openness to change
- Often cause retaliatory behavior

*You messages* can feel like the first shot fired, starting the unintended psychological turf war. On a subconscious level, *you messages* convey a strong point: *I know how you should be, so change! What's your problem?*

# Techniques for Giving Feedback

## I Messages

In his book, *Leader Effectiveness Training, L.E.T.*, clinical psychologist Dr. Thomas Gordon introduces the concepts of *you messages* and *I messages* and discusses their effect on a people's ability to influence. I-messages take the following form: behavior, emotion, and effect.

**Behavior:** An objective description of only the behavior that was perceived.

**Emotion:** A sincere statement of your emotional reaction to the perceived behavior. Intended to help convey the importance that you attribute to what you perceived.

**Effect.** A description of the effect of the behavior in regards to a larger value that you hold in common, such as a team value or a mission-driven value.

An I message allows the recipient an escape without feeling threatened by providing a concrete way of separating the *who* from the *what*. This separation allows both the evaluator and trainee to focus on the standard and how to improve to meet it.

Being able to influence people is difficult unless they accept what you say. *You messages* erect barriers. By contrast, *I messages* produce an opposite effect. An *I message* is a way to tell someone you have a problem with their behavior, without necessarily invoking a defensive response that *you messages* can cause.

## Opening the Conversation

A technique for giving feedback starts with an observation of what was seen or heard, follows with an open-ended question to check the trainee's perceptions, and closes with a discussion alternative strategies.

1. Observation (I Message Format– Behavior, Emotion, Effect)
2. Open ended question – discussion with individual
3. Discussion of alternatives

**Example #1:** *“IC, I was concerned that during that last 45 minutes you were completely focused on putting that Temporary Flight Restriction (TFR) into effect. Your team completed the whole*

*end state without any input from you. Plans asked for your thoughts twice without any response. What was going on there that you felt the need to get so distracted with that?"*

*Discussion...*

*"Well, my experience when I find myself getting into the weeds like that is I feel like a cat chasing a laser pointer beam. When my team sees me doing that they know to use the trigger point "Cat Toy!" because I can get tunnel vision into detail.*

*I'd expect you to discuss that with the C&G tonight and maybe the trigger point you arm them with can be "TFR!" or something else that would be kind of funny and be meaningful for you."*

**Example #2:** *"Logistics, I'm really surprised that while the team was working through the Common Operating Picture (COP), you stayed off in the corner reading through the previous IAP. I didn't hear you provide any input at all during the whole discussion. The Logs perspective was never incorporated and as a result, the team made some decisions based on inaccurate SA. What caused you to decide to not participate?"*

## Using Active Listening to Deepen Understanding

Comprehensive understanding requires pairing together facts and context. Active listening provides an effective means of tapping into other's subconscious memories and perspective.

For every word spoken, there is an associated *context* in the form of verbal inflection and non-verbal signals. When they are congruent, the strength of the message is stronger. Incongruence may indicate a disconnect between what is said and what is felt. When trying to discern meaning, any disparity may indicate that there is more to the story. In stressful situations, people may not even be aware of the incongruity.

Active listening statements promote a deeper understanding of the situation and help clarify meaning in emotionally charged situations.

**Encouragement.** Staff members give others encouragement both verbally and non-verbally. Shutting out distractions such as radio chatter and focusing attention on the person communicating are ways to encourage others to share their knowledge.

**Decoding.** Decoding statements, also called reflective statements, build trust and draw out more information than routine questions about the facts. When you use reflective statements, you restate or decode the emotion behind the speaker's statement.

A person who has strong feelings about a subject often imprecisely conveys emotion into language, sometimes pairing a verbal *yes* with a non-verbal *no*. Any inconsistency then has to be decoded by the listener, and then interpreted.

Although you interpret emotions at some level subconsciously, decoding requires a conscious effort to identify the emotion and say it out loud for verification.

**Restatement** is a way to restate the factual part of the message using your own words. Simply verifying the facts implies that you respect what the person is saying and are taking them seriously, building trust and respect.

Restatement is a good way to get a quick map check and reaffirm your understanding of the situation. It also helps calm people down and provides focus.

**Inquiry.** When you use inquiry, you are probing the sender’s content for more breadth or detail. Use questions that cannot be answered with a simple *yes* or *no*. Open-ended questions force the sender to elaborate or explain, providing you with more information.

Questions should be designed to either confirm or eliminate possibilities. It’s important when asking questions that they are phrased in a way that stays objective and don’t appear to be leading, interrogating, or taking sides.

Another effective tactic, especially when talking to experienced people, is to ask them to *think out loud* to explain how they made a decision or why they sized up a situation as they did.

Often perceptions and judgments of seasoned responders are so automatic that they don’t realize they are distilling meaning from a vast amount of information. When encouraged to slow down and step through how a conclusion was reached, a person may start by saying, “I really didn’t think about it. It was so obvious.” However, the explanation may bring to light meaningful insight.

**Summarizing.** In understanding complex situations, it’s important to summarize the main ideas and any conclusions that have been reached. These summaries strengthen common understanding by making sure that everyone has a shared perception of the most salient points.

### Summary of Active Listening

Technique	Purpose	Method	Examples
<b>Encouragement</b>	To gain trust by listening To focus on the speaker To gain understanding while you stay neutral	Eliminate distractions Use noncommittal words with positive tone of voice. Use non-verbal encouragement.	I see ... Uh-huh ... That's interesting... Tell me more...
<b>Decoding</b>	To understand the emotion behind a statement To connect subconsciously with person	Restate or decode the speaker’s emotion about the situation.	You don’t sound very keen about that idea... You’re really frustrated over the way this turned out...
<b>Restatement</b>	To demonstrate understanding To verify the facts separate from emotion.	Restate the facts so far as you understand them.	If I understand, this happened then that... In other words, this is your decision...
<b>Inquiry</b>	To deepen understanding about the situation or the speaker’s viewpoint	Open-ended questions that require more information.	What do you think the reason is? How is it different than before? What happened after that?

<b>Summarizing</b>	To pull together important bottom line ideas and conclusions To establish a basis for further discussion or for problem resolution	Restate, reflect, and summarize major ideas.	These seem to be the key ideas you have expressed... If I understand you, you feel this way about the situation.
<b>Silence</b>	To encourage and allow speaker to keep speaking.	Respectfully listen.	

## Questions for Understanding Behavior

The following are examples of five types of questions:

- **Conceptual clarifications**—These types of questions encourage people to explain their ideas and recommendations more clearly and precisely.
- **Probing assumptions**—Probing of assumptions forces people to put into words their presuppositions.
- **Probing rationale, reasons, and evidence**—These kinds of questions dig into the reasoning behind conclusions or recommendations. Pursuing this type of questioning helps guard against running with ideas that have a shaky foundation.
- **Questioning viewpoints and perspectives**—Individuals naturally relate information from a unique perspective. These questions explore the soundness of that perspective.
- **Probe implications and consequences**—Use these kinds of questions to step through the consequences of recommendations.

### Conceptual Clarification

What exactly does this mean?  
How does this relate to what we have been talking about?  
What is the nature of...?

What do we already know about this?  
Can you give me an example?  
Are you saying... or...?  
Can you rephrase that?

### Probing Assumptions

What else could we assume?  
How did you choose those assumptions?  
Please explain why/how...?

How can you verify or disprove that assumption?  
What would happen if...?  
Do you agree or disagree with...?

### **Probing Rationale, Reasons, and Evidence**

Why is that happening?	How might it be refuted?
How do you know this?	How can I be sure of what you are saying?
Show me...?	Why is... happening?
Can you give me an example of that?	Why? (keep asking it—you will likely get a different answer each time)
What do you think causes...?	What evidence is there to support what you are saying?
What is the nature of this?	On what authority are you basing your argument?
Are these reasons good enough?	
Would it stand up in court?	

### **Questioning Viewpoints and Perspectives**

Another way of looking at this is..., does this seem reasonable?	Why is it better than...?
What alternative ways of looking at this are there?	What are the strengths and weaknesses of...?
Why is... necessary?	How are... and... similar?
Who benefits from this?	What would... say about it?
What is the difference between... and...?	What if you compared... and...?
	How could you look another way at this?

### **Probing Implications and Consequences**

Then what would happen?	How does... affect...?
What are the consequences of that assumption?	How does... fit with what we learned before?
How could... be used to...?	Why is... important?
What are the implications of...?	What is the best...? Why?

# Documenting Performance in the PTB

## Perceived Performance

The Position Task Book (PTB) process is centered on assessing the preparedness of trainees for assuming the responsibilities for a position. It relies on the observance of behaviors in specific situations and appropriate contexts for making this assessment. The behaviors assessed range from those that are narrowly technical to those that broadly encompass leadership and teamwork. The evaluator focuses on perceived performance in relation to the standards described in the PTB and avoids making assumptions of the feelings or motives of the trainee.

## Cross Leveling Feedback

The PTB process depends on the professional judgment of the evaluators. Because it typically requires multiple evaluation events involving different evaluators, the trainee is assessed across time and in different contexts.

## Exceeding Standards

It is just important to document strengths to sustain as well as things that need attention. This helps identify rising stars and those who can handle more difficult assignment or levels of responsibility for mentors to develop.

*“Jessica performed well above my expectations. Throughout the incident, she continually demonstrated performance normally associated with experienced Finance Chiefs at the Type 1 level. Her ability to keep cost reporting ahead of the power curve and her knowledge of incident business administration continued to impress me throughout the event. Jessica should be encouraged to progress towards Type 1 quals or specialized buying or business teams.”*

## Not Meeting Standards

When observing performance that does not meet standards, the cause can be categorized in three ways:

### *Can't comply*

*Can't comply*, the standard is not met because the person does not have the resources or the ability to perform to standard. In this case, the expectation was somehow inconsistent with the situation and the evaluator needs to adjust the expectation or situation, if possible.

### *Don't know how*

*Don't know how to comply*, the person lacks the knowledge or skills to accomplish the task. The evaluator records the observation and discusses the gap in preparedness with the trainee, perhaps providing the training or mentoring needed to correct the situation.

### *Won't comply*

*Won't comply*, the person has the skills and resources but has chosen not to meet the standard. The evaluator's role in this situation is to affirm the standard and to leave the responsibility for sub-standard behavior in the hands of the trainee to correct.

## Written Examples

### Skill Issue – Needs significant work

#### Observation 2 notes

Date	Incident	Evaluator
7 July 2018	Muleshoe Fire	Eddie Pulaski, OSC1

I observed Mark during 3 operational periods. During this time Mark appeared to have difficulty in adapting his tactical thinking at a Type 3 level to a much larger scale at the Type 2 level. Specifically, Mark struggled to integrate all the information on needs for the next day coming from the divisions and incorporate that correctly into strategy updates and the operational planning worksheet for the next period. I had to assist him extensively in adjusting boundaries and adding divisions based on fire growth and strategy changes, projecting resources and drafting the work assignments in enough time for the next IAP. I recommend before Mark goes out on another assignment that he works with some mentors on his home unit to work through these processes using historical or simulated fires.

### No Issue – Met the standard:

#### Observation 2 notes

Date	Incident	Evaluator
7 July 2018	Muleshoe Fire	Eddie Pulaski, OSC1

I observed Susan during 3 operational periods. She successfully showed all the skills needed to work as an OSC2 with the C&GS for this task. Susan showed an appropriate understanding of the values at risk and the tactical and strategic dimensions of the incident. She contributed to the refinement of end state, objectives and strategies. She developed sound tactics and worked well with Logs, Plans and Safety as a team to develop the plan and resource for the next day's operation. Susan also demonstrated a solid understanding of risk management. She met all timelines and standards for development of quality division assignment sheets for the IAP.

### Behavior Issue – Did not show improvement

#### Observation 2 notes

Date	Incident	Evaluator
7 July 2018	Muleshoe Fire	Eddie Pulaski, OSC1

I observed Bill during 3 operational periods. Throughout this time, Bill successfully demonstrated all the skills to lead operations in the field. Where Bill was not successful was in meeting the needs of his fellow C&GS members in a timely manner. I did not see any kind of personal tracking system where he captured the needs expressed by team members in several C&G meetings. Despite my giving Bill suggestions and feedback on Days 1 and 2 I did not see any kind of proactive effort to provide routine information, be it finance, or operational feedback to plans. Multiple times, Bill had to be reminded over the radio and in meetings to provide information that should be flowing automatically. The only exception I saw was when Bill needed resources or supplies relevant to the operations in the field. This had a significant impact on the trust level of the C&G. Several verbalized that they felt Bill showed

concern only for operations in the field and discounted their requirements and deadlines. I recommended to Bill that he spend time with other C&GS sections and gain an appreciation of their roles and contributions to the incident end state.

## Behavior Issue – Showed improvement

### Observation 2 notes

Date	Incident	Evaluator
7 July 2018	Muleshoe Fire	Eddie Pulaski, OSC1

I observed Alex during 3 operational periods. Alex was technically successful, but during the first day I observed at least three different occasions where she cut off a crew leader asking a question, or input from a DIVS and a Branch Chief. At another point, a look out was told to “standby” during a radio call. The lookout tried to call back to relay that the fire was reaching a designated trigger point and her response in a punitive sharp tone was “What part of standby do you not understand?” I talked with these individuals and they relayed they felt a lack of respect from Alex and that this affected their trust in her. Alex and I discussed this and she apologized to the people involved, and I was impressed with her sincerity. The next day she worked on this and although there was one busy time when she cut a subordinate off, she caught it and immediately apologized to him. The 3<sup>rd</sup> day she briefed in the division breakout that she was working on this and would appreciate feedback from subordinates if anyone observed her do this. I felt Alex is taking this seriously and I recommended to her that she continue to brief people and ask for their feedback.

## Summary

When giving feedback:

- Keep in mind the high trust state—give honest feedback but also try not to erode relational trust in the process.
- Keep perspective: keep comments and feedback balanced and in the appropriate context.
- When reporting emotional feedback (such as *gut feelings*) keep the feedback centered on how you perceived it or how you felt.
- All feedback is meant to assist others in improving themselves. Keep the person’s best interest at heart.

When receiving feedback:

- Use active listening for clarification if you don’t understand a comment.
- Keep in mind that all feedback gathered is only the perception of another person’s behavior at a particular time and in a particular context.
- Keep perspective when looking at feedback, and pay more attention to trends than individual ratings.
- Keep up the high-trust state—be open to feedback and reflect about how it applies to you.