Incident Based Automation, IBA, System
Business Process Modeling, Interview
Procurement Unit Leader
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Interview Notes by Craig Tanner, Senior Data Architect

NOTE: See interviewer questions at bottom based on interview write-up. Answer to be provided for finalization of interview notes.

Has a procurement warrant of $25 million per transaction. This works differently for other agencies. For example, a BLM officer may have a different regulation for procurement.

Procurement is under the Finance Section Chief

Question: What are your first actions at an incident?

Answer:

1. Attend the in-briefing (all staff down to the unit leader level usually attend the in-briefing), but the attendance of any of the staff may depend on the IC.
2. After the in-briefing, the PUL meets with the Incident Business Advisor and the Local Administrative Officer.
3. The PUL must begin to understand the guiding principles that will set the boundaries for the PUL:
    a. Written instructions from local administrator that will describe what the PUL will have authority for.
    b. Local administrative guidelines
        i. Service and supply plan
        ii. Payment procedures,
        iii. Cooperative or interagency agreements
        iv. Availability of local contracting officers,
        v. Incident Finance Package Requirements
        vi. Presence of other special teams or personnel
    c. The Finance package that they eventually prepare must meet the needs of the Host Agency as well as the incident management handbook (The finance package has to meet certain expectations).
    d. On some incidents, the local administrative office doesn't want the PUL to actually make buying transactions, but to go through the Buying Team

Question: How does the PUL and buying team differ?

Answer:

1. The Buying Team works for the Forest Supervisor, and is not usually located at the incident.
2. The Buying Team is the primary source of purchases from local vendors.
3. The Buying Team is ordered as a resource on Type I and Type II incidents.
4. PUL might have signature authority to sign Land Use Agreements
5. Buying Team might also have a “Contract Specialist” (OPM 1102 Series)

Question: What are the initial operations of the PUL?

Answer:

1. May travel with local administrator to find a location for the base camp. The PUL is important here because it is often necessary to establish a Land Use Agreement for the location of the base camp.
2. If taking over from a Type I or Type II team, they shadow the outgoing PUL
3. If not taking over, the PUL must set-up their work area and get connected to I-SUITE. Should have their standard kit to include forms, PC’s Fire management hand book, etc.)
4. Must begin to understand the resources that have already been procured, what is on the incident and what has been ordered.

Question: How is procurement handled initially for each resource?

Answer:

1. The PUL collects a package (file) of information for each resource that is on the incident. This includes:
    a. Copy of contract or agreement
        i. Daily Rate / Hourly Rate
    b. Resource Order
    c. Shift Ticket
    d. Inspection Report
    e. Equipment time recorded by Equipment Time Recorders
2. Filed by Resource Order Request Number or by Contractor Name
3. Initial information is typically collected without computer support
    a. When I-SUITE comes online, all of this information must now be entered into I-SUITE
    b. Some PULs will enter some of this information themselves so that they can become familiar with the contractors and types of resource recording that will be required and expected during the incident.
4. Since some information can be entered by either the PUL and the Time Unit Leader, they typically will negotiate who is to enter what data

Question: What are the steady-state operations for the PUL?

Answer:
1. Continuation of the entry of contract information for the duration of the incident.
2. Negotiating and establishing additional land use agreements as necessary during the incident. (for example, when logistics and ground support come in and request additional land for sleeping base, or equipment staging, etc.)
3. Review of Shift Tickets
    a. For example to determine if resources are taking meal breaks.
    b. For example that contractors have entered their start and stop times and that their time is signed
4. Emergency Equipment Rental Agreement
5. Working closely with the resource group
6. Working closely with logistics
    a. Base camp manager
    b. Ground support leaders who inspect all of the equipment

Question: What are the things you do to close down (demob)?
1. Finalize invoices – the amount of money a contractor will be paid
2. Get signatures on final invoice
3. Release Inspections and damage claims
4. Ensure that all check-out equipment is checked back in (radios, supplies, etc.)
5. Make sure that all resource files are complete and make copies of everything in each file. Original file is kept at the Forest unit.
6. Auditing for errors
    a. There could be a lag time by as much as 24 hours before the PUL can audit for errors.
    b. Must audit every resource file (one file per resource on the incident)
    c. It can take up to a whole day to audit this information
    d. Auditing should be on-going, but is especially busy at demob.
    e. Errors can be found at check-out time
    f. Coordination between Cost Module and Time Module in I-Suite will highlight errors. Omissions

<u>Recommendations</u>:
1. Need additional PULs with contract signing authority. PULs are typically procurement officers within their agency and their buying authority is based on their warrant in that agency. Since these people are usually working on procurement issues for their agency (especially nearing the end of summer). This limits their availability for an incident, leaving some incidents without a PUL.
2. Could use additional PUL staff during the demobilization "crunch time." There are sometimes considerable delays in getting the demob information done, such as the invoices.
3. Standardize the methods and procedures of the PUL work
4. Need more training for all Type I and Type II PULs based on standardized methods and procedures

5. DUNS and/or taxpayer ID number, name of contractor, codes and addresses and other contract data should be downloaded from agency contracting systems.
    a. The PUL currently has to re-enter a lot of this contract data from the original agreement hardcopy form. An example of this is the Emergency Equipment Rental Agreement (EERA) which is usually brought to the incident by the contractor in paper form. This is redundant data entry. Contract information is entered into I-SUITE for each incident, regardless of whether or not that contractor has been entered into I-SUITE before at another incident. If no PUL on site, everything must go through the Buying Team, which must get agreement signatures by fax from a contracting officer at their agency.
    b. VIPER is a system that will contain all of the Forest Service contract information.
    c. Need a ROSS interface with these contracting systems as well.
    d. Some dispatch centers are entering this information into ROSS. If this information is in ROSS, then an interface is needed to download from ROSS into I-SUITE.