

# Program Delivery Task Force Leader (PD TFL) Position Assist Stage 4

Public Assistance Division

Recovery Directorate

Office of Response and Recovery





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## COMMON TERMS & ACRONYMS

| ACRONYM/ABBREVIATION | DESCRIPTION   |
|----------------------|---|
| CRC                  | Consolidated Resource Center                        |
| Lane TFL             | Consolidated Resource Center Lane Task Force Leader |
| DDD                  | Damage Description and Dimensions                   |
| DILO/WILO            | Day in the Life of/Week in the Life of              |
| EC                   | Exploratory Call                                    |
| EEI                  | Essential Elements of Information                   |
| EHP                  | Environmental and Historic Preservation             |
| EMMIE                | Emergency Management Mission Integrated             |
| FEMA                 | Federal Emergency Management Agency                 |
| JFO                  | Joint Field Office                                  |
| OFA                  | Other Federal Agencies                              |
| PA                   | Public Assistance                                   |
| PAGS                 | Public Assistance Group Supervisor                  |
| PDA                  | Preliminary Damage Assessment                       |
| PDMG                 | Program Delivery Manager                            |
| PD TFL               | Program Delivery Task Force Leader                  |
| RSM                  | Recovery Scoping Meeting                            |
| SIR                  | Site Inspection Report                              |
| SI TFL               | Site Inspector Task Force Leader                    |
| SOW                  | Scope of Work                                       |
| SPPM                 | Specialized Project Manager                         |
| RTM                  | Recovery Transition Meeting                         |
| RFI                  | Request for Information                             |
| DIU                  | Document Integrity Unit                             |
| SI                   | Site Inspector                                      |
| DOP                  | Disaster Operation Profile                          |
| OPS TFL              | Operations Support TFL                              |
| DM                   | Determination Memorandum                            |



**The PA Grants Manager** is the tool that FEMA employees use to assign and track actions throughout PA project development. It is used by Public Assistance, EHP, and Mitigation to collect all PA project-related information and documents, including correspondence. EMMIE remains the system of record for grant administration and providing funding to Recipients. The Document Integrity Unit (CRC) is responsible for ensuring all information/documentation EMMIE matches the information/documentation in the PA Grants Manager.

The **PA Grants Portal** is the Recipient and Applicant side of the PA Grants Manager. Recipients and Applicants review and approve projects, upload documents, and track PA project development in the PA Grants Portal.

## Why Program Delivery Task Force Leaders Matter

Program Delivery Task Force Leaders (PD TFLs) have an integral role in the successful implementation of the PA delivery model. The PD TFL serves as a conduit between Public Assistance Group Supervisor (PAGS) and the Program Delivery Managers (PDMGs), communicating the Joint Field Office (JFO) operational priorities to the PDMGs. The PD TFL keeps the PAGS informed on the day-to-day activities and accomplishments of PDMGs. The PD TFL ensures the workload of PDMGs is balanced, allowing the PDMGs to focus on providing excellent customer service to applicants. The PD TFL manages and mentors PDMGs throughout the PA grant delivery process. PD TFLs ensure they set the conditions to ensure success of their PDMGs.

This Position Assist provides PD TFLs guidance on how to successfully perform their roles in supporting their PDMGs, ensuring timely, accurate delivery of the PA program. The following icons are used throughout the document and are described below:

## PD TFL Roles and Responsibilities

The PD TFL facilitates the work of PDMGs. In order to do so, it is incumbent upon the PD TFL to be knowledgeable of the PDMG Position Assist and the key outcomes for this position. Key responsibilities of the PD TFL include managing operational objectives and priorities, tracking and reporting progress of PDMG activities, resolving issues, supporting the Determination Memo process, coaching and mentoring PDMGs.

One of the primary principles of the PA delivery model is focus on customer service to the Applicant. PD TFLs oversee customer service element of the PA delivery model as they mentor and coach their staff for success.

## Manage and Monitor Workload of PDMGs

PD TFLs will manage and monitor workload assigned to the PDMGs. In order to do this effectively the initial sit with is a critical element to understanding the PDMGs skill sets and experiences. This will allow the TFL to make the appropriate assignment recommendations to the PAGS as well as knowing what level of coaching/mentoring that PDMG may need. PDMG assignments are based on the assessed knowledge, skills and abilities of individual PDMGs. PD TFLs will provide PDMGs with relevant information on their assignments and understanding of the Applicant and potential workload. PD TFLs will track and balance workload of each PDMG throughout the process.

PD TFLs will continually ensure that PDMGs track and follow up on key activities throughout the delivery process, including results of the weekly follow up meetings and continuous update of information in the PA Grants Manager. The TFLs will oversee and review eligibility recommendations, facilitate the Determination Memo process when issues are raised, oversee Recipient engagement and establish working relationships with PDMGs. They also will provide assistance with and oversight of coordination with EHP and Mitigation. PD TFLs track progress to ensure PDMGs approve accurate DDDs for Standard and Specialized projects and successful completion of EEIs for Completed/Fully Documented projects. Additionally, they should verify that PDMGs have scheduled weekly follow up meetings with Applicants as part of the program delivery plan to ensure excellent customer service is being provided in order to facilitate the grant development.



## Coach and Mentor Staff in Effective Completion of Work

PD TFLs oversee progress and quality of work throughout the process and provide guidance and/or make adjustments as needed. The PD TFL will conduct regular sit-withs with PDMGs to discuss performance observations and provide coaching on identified areas for improvement and best practices. They will assist with and review the DILO/WILOs of assigned staff. Throughout the grant development process, the PD TFL will emphasize the use of the position assist and other tools to support the grant development process. TFLs should establish weekly meetings with their team to discuss issues, concerns and any lessons learned.

## General Operational Procedures

The PD TFL receives operational objectives and priorities from the PAGS, communicates those to PDMGs, and ensures PDMGs meet those objectives and priorities. The PD TFL establishes working relationships with the Recipient, other TFLs, and PAGS early in the event. The PD TFL participates in daily Huddle Board meetings with PAGS during which the PD TFL will report on PDMG work status and any issues identified. The PD TFL will conduct daily Huddle Board meetings with PDMGs to explain operational objectives and hear the progress of daily planned and completed activity of each PDMG. Issues or concerns that have been addressed during a huddle, should be addressed back to the team as quickly as possible. Those are captured on your huddle board in the parking lot.

## Phase I - Operational Planning

The Phase I objective is to identify Applicants' disaster impacts and recovery priorities by:

- Conducting successful Exploratory Calls and Recovery Scoping Meetings
- Drafting an initial Damage Inventory for each Applicant

PD TFLs support the Phase I operational objectives by completing the following actions:

### ☐ Become Familiar with Disaster Impacts

Successful operations in Phase 1 begins with Regional leadership, Recipient, and the PAGS review of the events PDA data as well as any historical known data. They develop the Disaster Operating Profile (DOP) based on this information.

#### **Disaster Operating Profile**

Developed by the Region from the Preliminary Damage Assessment (PDA), the Disaster Profile continues to evolve as more information is learned or gathered and includes:

- Information on the type of peril;
- State, Local, Tribe, or Territory capacity;
- Primary impacts from the event;
- Estimated disaster-related damage by Category of Work;
- Significant damages;
- Geographic considerations;
- Projected number of Applicants (including Private Non-profits);
- Projected number of Project Worksheets (PWs);
- Special considerations challenges;
- Mitigation opportunities; and
- Potential Other Federal Agency (OFA) involvement.

The DOP will evolve once a declaration is declared and more information is gathered throughout Phase 1. The initial organization structure to support PA recovery operations is developed from the DOP and timeline to deployed staff is created.

Upon arrival to the disaster, the TFL reviews the DOP to get situational awareness of the disaster. The PAGS conducts a sit with and assigns the TFL a geographic area. The TFL reviews the DOP with a specific focus on their area of assignment.



## □ Participate in the Disaster Overview Briefing

The PAGS and Recipient will develop and conduct a Disaster Overview Briefing for field and CRC staff. During the Briefing, PAGS

- reviews the Disaster Operating Profile
- establishes the operational tempo of the event
- sets overall expectations
- describes the level of participation by the Recipient
- presents EHP concerns and potential mitigation opportunities

Given staggered deployments, the PAGs may need to conduct multiple briefings or the PD TFL will provide the information to new staff. The PD TFL should support the PAGS in developing and conducting these briefings, as required.

## □ PDMG Applicant Assignments

Prior to assigning Applicants to PDMGs, the PD TFL conducts an initial sit-with with each PDMG. The PD TFL assesses the knowledge, skills and abilities (KSA) and discuss performance expectations. Each PDMG's skills and experience details will be annotated on the sit with form. The PD TFL also uses the initial sit-with to identify staff that need additional coaching and mentoring.

PD TFLs reviews the PDMG KSAs and Applicant information and makes assignment recommendations to the PAGS. PD TFL will take into consideration the following when making the recommendation to the PAGS:

- Skills, category of work specialties, and specific technical expertise/experience of PDMGs
- Geographic location of the Applicants
- Anticipated workload of each Applicant based on the Disaster Operating Profile, including Applicant capability and previous disaster experience.
  - Workload planning factor is 5 Applicants to 1 PDMG. This ratio may be less due to the size of the applicant and severity of the damages.

**PERFORMANCE EXPECTATION:**

Applicants will be assigned to PDMGs within 2 days of RPA approval

PAGS makes PDMG assignments in PA Grants Manager. PAGS may delegate this activity to the PD TFL. After the assignment, the PD TFL ensures PDMGs

- Coordinate with Recipient counterpart to gather additional information on Applicants
- have relevant information on their assignments
- understand immediate next steps in Applicant engagement
- understand and operational priorities/timelines

PD TFLs monitor results of Exploratory Calls and Recovery Scoping Meetings to ensure workload is continues to be balanced.

### ☐ Assign each PDMG a Conference PIN

Given staff constraints, Recipient representative(s), Mitigation and EHP staff may not be able to participate in Exploratory Calls, Recovery Scoping Meetings or important follow up meetings in person. Therefore, the PDMG provides a conference line at each meeting to allow staff to participate remotely.

The PD TFL assigns conference call PINS to each PDMG at the onset of the event and ensures the PDMG uses the PIN for those meetings that require remote participation. Individual PIN numbers assigned should remain active until the Recovery Transition Meeting has been completed.

After the Disaster Overview Briefing by the PAGS, the TFL holds a team meeting to ensure all clearly understand expectations, describe the team's area of responsibility, address any questions, and emphasize the importance of information sharing during huddles. Effective communications is essential to individual and team success. DILO/WILO

### ☐ Monitor Exploratory Calls

PD TFLs ensure PDMGs are prepared for Exploratory Calls (ECs) and also monitor the completion of ECs.

- Meet with team to review EC objectives and set expectations
- Help PDMGs prepare for their first Exploratory Calls (Refer to Exploratory Call Guide)
  - o Conduct mock ECs
  - o Pair less experienced PDMGs to listen to an EC conducted by a more experienced PDMG
- Ensure PDMGs coordinate with Recipient representative (if Recipient elects to participate in the Exploratory Call)
- Monitor the length of time between Applicant assignment and conducting the Exploratory Call
- Ensure Exploratory Calls meet operational objectives and are held in a timely manner
- Observe at least one Exploratory Call for each PDMG and conduct sit-with to discuss observations
- Monitor scheduling of Recovery Scoping Meetings ensuring Applicant has time to submit a Damage Inventory
- Ensure PDMGs with multiple applicants schedule RSMs far enough apart to accomplish transition task
- Ensure accurate and complete data is entered in the PA Grants Manager within 1 day of the Exploratory Call

### ☐ Monitor Recovery Scoping Meetings

PD TFLs ensure PDMGs are prepared for Recovery Scoping Meetings (RSMs) and also monitor the completion of RSMs.

- Meet with team to review RSM objectives and set expectations
- Help PDMGs prepare for their first Recovery Scoping Meetings (Refer to Recovery Scoping Meeting Guide)
  - o Conduct mock RSMs
  - o Pair less experienced PDMGs to listen to an RSM conducted by a more experienced PDMG
- Ensure PDMG completes all activities required in advance of the RSM
  - o Meet with Recipient POC, EHP and Mitigation staff to prepare for the Recovery Scoping Meeting
    - Discuss Damage Inventory, roles and responsibilities during the meeting, and agenda for the meeting
  - o Contact applicant prior to RSM to verify attendees and review Damage Inventory
  - o Coordinate with SI TFL discuss site inspection availability for types of damages identified during EC
- Ensure Recovery Scoping Meetings meet operational objectives and are held in a timely manner
- Observe at least one Recovery Scoping Meeting for each PDMG and conduct sit-with to discuss observations-hold lessons learned meeting
- Ensure site inspections are planned during the Recovery Scoping Meeting
- Ensure the PDMG develops a Program Delivery Plan, identifying follow-up meetings and update in PA Grants Manager calendar for a minimum of 30-45 days
- Ensure PDMGs maintain accurate record of all correspondence (emails, calls, meetings) in the PA Grants Manager by providing detailed comments in the Applicant Profile

#### ☐ **Conduct Regular Sit-Withs and Daily Huddle Board Meetings**

- Utilize Huddle board and Sit-With guidance attached
- Ensure to integrate EHP, MIT and Recipient POCs in huddle meetings

#### ☐ **Participate in Daily Huddle Board Meetings with PAGS**

#### ☐ **Hold weekly wrap up meetings with team**

PD TFLs conduct weekly meetings to discuss lessons learned and wrap up of the weeks activities. This ensures communication across the team.

## Phase I Checklist

### PD TFL Actions

- ☐ Become familiar with disaster impacts
- ☐ Participate in the Disaster Overview Briefing
  - ☐ Support PAGS, as requested
- ☐ Conduct initial PDMG Sit-Withs
  - ☐ Assess KSAs
  - ☐ Complete skills matrix
  - ☐ Set expectations
- ☐ Develop PDMG assignment recommendation
  - ☐ Discuss with PAGS
- ☐ Hold team expectations meeting
- ☐ Emphasize integration and good communications with Recipient POC, EHP and MIT
- ☐ Assign Applicants to PDMGs in PA Grants Manager, if requested by PAGS
- ☐ Assign each PDMG a Conference Call PIN
- ☐ Prepare PDMGs for ECs
  - ☐ Allow inexperienced PDMGs to monitor EC
- ☐ Hold team meetings to discuss outcomes of EC, RSMs and address issues or concerns
- ☐ Monitor ECs
  - ☐ Observe at least one Exploratory Call for each PDMG
  - ☐ Conduct sit-with after observing EC
- ☐ Ensure PDMG updates GM
- ☐ Monitor Recovery Scoping Meetings
  - ☐ Observe at least one Recovery Scoping Meeting for each PDMG
  - ☐ Conduct sit-with after observing RSM
- ☐ Conduct daily Huddle Board meetings
- ☐ Conduct regular sit-withs
- ☐ Participate in daily Huddle Board meetings with PAGS
- ☐ Participate in the weekly calls with CRC and the Recipient
- ☐ Ensure PDMGs meet Phase I performance expectations
- ☐ Conduct weekly wrap up meetings

**Managing Performance Expectations**

- Expectations meeting with staff
- Upon Applicant assignment Conduct the Exploratory Call within 7 days of Applicant assignment
- After Exploratory Call, update the PA Grants Manager within 1 day.
- Meet with Recipient, EHP, and Mitigation no later than 3 days before the RSM to discuss the agenda of the RSM.
- Coordinate with SI TFL prior to RSM
- Within one day of the RSM contact the Applicant to discuss the Damage Inventory and confirm who is attending.
- Conduct RSM
  - Identify available times for site inspections
  - Schedule follow up meetings

## Phase II- Intake Damage and Eligibility Analysis



The Phase II objective is to capture Applicant's disaster related damage and determine eligibility within 60 days of the Recovery Scoping Meeting (RSM) through:

- Logically group damage line items into projects
- Submitting Site Inspection Work Order requests
- Submitting Essential Elements of Information requests to the applicant
- Conducting site inspections for Standard and Specialized projects
- Applicant agreement to Damage Description and Dimensions for Standard and Specialized projects
- Completion of EEIs

During Phase II, PD TFLs oversee eligibility recommendations, facilitate issue coordination with other TFLs, and spot check Damage Description and Dimensions (DDD)s that have been approved by the PDMGs and the completion of EEIs to support the Completed/Fully Documented projects. It's critical for the TFL to maintain situational awareness of the PDMGs workload and any issues that may be impeding an applicant recovery. PD TFLs support the operational objective of this phase by completing the actions below.

### ☐ Monitor the completion of post-Recovery Scoping Meeting activities

PD TFLs ensure PDMGs complete the post-RSM activities within 3 days of conducting the RSM:

- Update GM with results of RSM including detailed comments
- Logically group damage line items into projects
- Submit requests for Essential Elements of Information to applicant
  - Associating already uploaded documentation to EEI prior to submitting to applicant
- Submit Site Inspection Work Order requests
- Send follow up email to recap the RSM

### ☐ Spot check EEIs

PD TFLs spot check EEIs to ensure documentation requested is accurate.

### ☐ Spot check Site Inspection Work Orders

PD TFLs spot check Site Inspection Work Order to ensure the information is clear and concise. PD TFLs meet with SI TFL to address any issues or concerns with work orders.

### ☐ Hold weekly wrap up meetings with team

PD TFL should hold weekly team meetings to discuss lessons learned which will benefit the team as a whole.

- Damage inventory development
- Site Inspection Work orders
- EHP challenges, etc.
- Documentation challenges

### ☐ Monitor follow up meetings with Applicants

- Ensure PDMGs continuously update and follow the Program Delivery Plan developed with the Applicant
- Ensure PDMGs discuss EEIs, RFIs, DDDs, site inspections with the applicant
- Ensure PDMGs communicate the 60 day deadline to report and identify.
- Ensure PDMGs coordinate with Recipient POC, EHP and Mitigation where applicable
- Ensure site inspections have been ordered and are completed in a timely manner
- Ensure EEIs are completed for Completed/Fully Documented projects and Standard and Specialized lane projects

### ☐ Monitor completion of site inspections and DDDs

- Ensure PDMGs submit clear and concise work orders
- Ensure PDMGs review Site Inspection Reports and draft DDDs within 2 days of receipt from Site Inspector utilizing the DDD Review Checklist
- Ensure PDMG reviews EHP and Mitigation inspection reports to understand the EHP concerns and potential mitigation opportunities
  - o PDMG should meet with EHP and/or Mitigation if no site inspection report are in PA Grants Manager
- Ensure PDMGs notify Site Inspector, EHP and/or Mitigation if any issues need to be addressed
- Spot check approved DDDs and ensure PDMGs accurately verify data against the SIR and photos
- Ensure PDMGs formulate the site(s) into project(s) based on the results of the site inspections and finalize the project DDD(s) in a timely manner

### ☐ Monitor submission of Completed/Fully Documented projects sent to the CRC

- Ensure PDMG verifies documentation before completing the EEI and sending project to CRC

### ☐ Monitor Applicant review of DDD (Standard/Specialized projects)



## ☐ Monitor completion of Development Guide Questions

- Ensure PDMG reviews EHP and Mitigation inspection reports to understand the EHP concerns and potential mitigation opportunities
- Ensure PDMG discusses Development Guide questions during the review of Standard/Specialized DDDs with the applicant
  - o For specialized projects, ensure a Technical Specialist supports the PDMG's discussion about the DDD with the Applicant
- Monitor Applicant review and signature of DDDs for Standard and Specialized Projects

## ☐ Ensure accurate and complete data is entered in the PA Grants Manager

- Ensure PDMGs maintain accurate record of all correspondences (emails, calls, meetings) in the PA Grants Manager-detailed comments

## ☐ Review eligibility issues

- Ensure PDMGs make accurate eligibility recommendations
- Participate in discussions with PDMG on potential eligibility issues
- Elevate discussions to PAGS level, as necessary
- Review Request for Information (RFI) generated by PDMG
- Ensure PDMG discusses all RFI request with applicants
- Participate in meeting with Recipient and Applicant to discuss
- Review RFI response with PDMG to assess whether the RFI is satisfied
- Review the draft Determination Memo, as applicable
- Send draft Determination Memo to PAGS, as applicable
- Conduct Daily Huddle Board Meetings and Regular Sit-Withs
- Hold weekly wrap up meetings with team

## ☐ Participate in Daily Huddle Board Meetings with PAGS

## ☐ Participate in the weekly CRC and Recipient meetings



## Phase II Checklist

### PD TFL Actions

- ☐ Monitor completion of post Recovery Scoping Meeting activities
  - Logically group damage line items into projects
  - Requests for EEIs sent to Applicant
  - Site inspections ordered
  - Project Delivery Plan developed
- ☐ Spot check EEI requests
- ☐ Spot check Site Inspection Work Orders
- ☐ Monitor follow up meetings with Applicants
- ☐ Monitor timely completion of EEI request
  - Identify roadblocks and address with Recipient and leadership
- ☐ Monitor completed project submittal to CRC
- ☐ Monitor completion of site inspections and PDMGs review of DDDs
- ☐ Monitor Applicant reviews of Standard/Specialized DDDs
- ☐ Ensure completion of the Development Guide Questions
- ☐ Ensure accurate and complete data is entered in the PA Grants Manager
- ☐ Review eligibility issues and provide recommendations to PAGS
- ☐ Conduct daily Huddle Board meetings
- ☐ Conduct regular sit-withs
  - Observe at least one Applicant follow up meeting per PDMG
- ☐ Participate in daily Huddle Board meetings with PAGS
- ☐ Ensure PDMGs meet performance expectations
- ☐ Conduct weekly wrap up meetings with team



### MANAGING Performance Expectations

- Activities completed within 3 days of RSM
  - Formulate damages into project
  - Submit requests for EEI to Applicant
- PDMG will review the DDD within 2 days of receipt from the Site Inspector
- Receive Applicant concurrence on the DDDs within 3 days after sending project to the Applicant
- Ensure Development Guide Questions are addressed with each signed DDD
- Review the DDD, SOW, and costs within 3 days of receipt from the CRC
- Discuss and obtain Applicant signature on the Completed/Fully Document project within 5 days after sending the project to the Applicant



## Phase III- Scoping and Costing



The objectives of Phase III is to:

- CRC develop the DDD/SOW/costs for Completed/Fully Documented projects
- CRC develop the SOW/costs for Standard and Specialized projects
- CRC validate Applicant-provided SOW/costs for work to be completed
- Obtain Applicant signature on projects

In Phase III, PD TFLs oversee the timely resolution of Requests for information (RFI), if needed by the CRC, and facilitate eligibility issue resolutions with PDMGs and other TFLs. In addition, PD TFLs support the operational objective of this phase by completing the actions below.

### ☐ Monitor Requests for Information (RFI)

- Ensure PDMG reviews RFI to ensure it is clear and concise
  - o Review for information in GM
  - o Provide response to CRC, if applicable
- Ensure PDMG submits and discusses the RFI with the Applicant
- Ensure PDMGs regularly follows up on the RFI
- Monitor Applicant responses to RFIs

### ☐ Monitor Completed/Fully Documented projects from CRC

- Monitor PDMG review of completed Projects
- Ensure PDMG discusses project with applicant
- Monitor applicant review of Completed/Fully Documented Projects

### ☐ Monitor follow up meetings with Applicants

- Ensure PDMGs meet with Applicants to gather required documents or to discuss and sign projects

### ☐ Monitor PDMG reviews of Standard and Specialized Projects

- Ensure PDMGs review project within 2 days of receipt from the CRC

### ☐ Monitor Applicant reviews of Standard and Specialized Projects


- Ensure PDMGs meet with Applicants to discuss the SOW and costs, including mitigation proposal(s), EHP concerns, insurance reductions

- Applicants should complete this review within 5 days of receipt from the PDMG.
- ☐ **Monitor submission of Applicant-provided SOW/costs**
  - Ensure PDMGs discuss status of the SOW/Costs for these projects during their weekly meeting
- ☐ **Ensure accurate and complete data is entered in the PA Grants Manager**
  - Ensure PDMGs maintain accurate records of all correspondence (emails, calls, meetings) in the PA Grants Manager
    - Ensure accurate and complete data is entered in the PA Grants Manager
- ☐ **Review eligibility issues that are identified**
  - Participate in discussions with PDMG when potential eligibility issues are identified
  - Elevate discussions to PAGS level, as necessary
  - Review RFIs generated by CRC
  - Ensure PDMG schedules meeting with Applicant to discuss RFI
  - Review RFI response with PDMG to assess whether the RFI is satisfied
  - Review the draft Determination Memo and Letter, as applicable
  - Send draft Determination Memo and Letter to PAGS, as applicable
- ☐ **Conduct Daily Huddle Board Meetings and Regular Sit-Withs**
- ☐ **Participate in Daily Huddle Board Meetings with PAGS**
- ☐ **Participate in the weekly CRC and Recipient meetings**
- ☐ **Conduct weekly wrap up meetings**

## Phase III Checklist

| PD TFL Actions  |
|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Monitor RFIs from CRC</li> <li><input type="checkbox"/> Monitor follow up meetings with Applicants</li> <li><input type="checkbox"/> Monitor PDMG review of Completed/Fully Documented projects from CRC</li> <li><input type="checkbox"/> Monitor Applicant review of Completed/Fully Documented projects</li> <li><input type="checkbox"/> Ensure PDMG reviews SOW and costs for Standard and Specialized projects</li> <li><input type="checkbox"/> Monitor Applicant reviews of SOW and costs</li> <li><input type="checkbox"/> Monitor progress of Applicant-provided SOW and costs</li> <li><input type="checkbox"/> Ensure accurate and complete data entered in PA Grants Manager</li> <li><input type="checkbox"/> Review eligibility issues that are identified</li> <li><input type="checkbox"/> Monitor RFI responses</li> <li><input type="checkbox"/> Conduct daily Huddle Board meetings</li> <li><input type="checkbox"/> Conduct weekly or bi-weekly team meetings</li> <li><input type="checkbox"/> Conduct regular sit-withs</li> <li><input type="checkbox"/> Observe at least one Applicant follow up meeting per PDMG</li> <li><input type="checkbox"/> Participate in daily Huddle Board meetings with PAGS</li> <li><input type="checkbox"/> Participate in CRC and Recipient meetings</li> <li><input type="checkbox"/> Continue to ensure integration with recipient POCs, EHP and MIT</li> <li><input type="checkbox"/> Ensure PDMG meet performance expectations</li> </ul> |

|  Managing Performance Expectations  |
|--|
| <ul style="list-style-type: none"> <li>• Review the SOW and costs within 2 days of receipt from the CRC</li> <li>• Discuss and obtain Applicant signature on the project within 5 days after sending the project to the Applicant</li> </ul> |

## Phase IV: Obligation

The objective of Phase 4 is to obligate projects.

During Phase IV, final reviews are completed and funding is obligated for the project. The PD TFL ensures PDMG provides quality customer service to Applicants and conducts a thorough Recovery Transition Meeting.

### ☐ Recovery Transition Meeting

PDMGs must request to conduct the RTM through the Grants Manager. The Applicant must meet the following requirements before the Grants Manager will allow the PDMG to conduct the RTM:

- Damage Inventory has been signed by Applicant
- All damage line items in the Damage Inventory have been logically grouped (formulated) into projects
- All projects are signed by the Applicant.

The PDMG's request to conduct the RTM does goes to the Program Delivery TFL and PAGS for approval. After the request is approved, the PDMG can schedule the RTM in the Grants Manager.

PD TFLs will ensure PDMGs are prepared for the RTM and will observe at least one RTM for each PDMG. PD TFLs will ensure PDMGs conduct the meeting using the RTM Guide. After the RTM, PD TFLs will ensure PDMGs enter the results of the meeting in the Grants Manager and send to the Applicant for acknowledgement.



## How Performance is Evaluated and Keys to Success

Successful performance for a PD TFL is the effective management, coaching, and mentoring of PDMGs who in turn provide excellent communication and expectation management based on the Applicant's recovery priorities. PD TFL performance is evaluated based on the below criteria.

- Successful facilitation of PDMG work in all phases.
- Coordination for issue resolution with other TFLs and PDMGs.
- Quality and timely deliverables from staff; customer-centric service is provided to Applicants throughout the delivery process.
- Daily huddle board meets are held with report outs from staff that align with operational priorities.
- Assessing staff capabilities and assigning strategic workload.
- Tracking and balancing of staff workload.
- Reviewing staff Day in the Life of/ Week in the Life of (DILO/WILO) and following up as needed.
- Accurate damage eligibility recommendations made in a timely manner.
- Ongoing development of staff and evaluation of staff at the end of deployment (to include skills matrix).

## Position Task Books

The Position Task Book (PTB) is a vehicle to documenting proficiency in the competencies identified to meet job requirements for both trainees and candidates. The primary components of a PTB are Behaviors/Activity, Competency, Task, and Indicators. Demonstrated performance will be observed by a Coach-Evaluator who will determine if that particular task has been mastered.

## The Sit-With

A sit-with is a one-on-one feedback coaching session between the PD TFL and PDMG. PD TFLs will conduct an initial sit-with with PDMGs during which PDMGs will discuss their previous disaster experiences and skill sets. This discussion will inform the assigning of applicants per the anticipated workload. PD TFLs will conduct regular sit-withs with PDMGs throughout the deployment to discuss activities observed (Exploratory Calls, Recovery Scoping Meetings, follow up meetings with Applicants, etc.) or work have reviewed. The PD TFL will provide PDMGs real-time feedback on your performance – both best practices and areas for improvement – to ensure staff's continuous improvement.

## Day in the Life of/Week in the Life of Tool (DILO/WILO)

For time management purposes, all employees are required to maintain a DILO/WILO schedule. This tool serves as a standard work schedule that helps ensure daily activities align to weekly operational goals. This tool facilitates the identification and documentation of ongoing activities and accomplishments. TFLs are responsible for maintaining their own DILO/WILO schedule and overseeing the schedule of assigned staff. The following are examples of activities or tasks to include in a DILO/WILO:

- Review Disaster Operating Profile

- Conduct sit-with with PDMG
- Daily Huddles
- Participate in Recovery Scoping Meeting
- Review DDDs
- Follow up meetings with Applicants
- Track status of EEI and RFI follow up
- Weekly wrap up meetings

### The Daily Huddle Board

The PD TFL will conduct one huddle board daily. These are short stand up meetings (no longer than 15 minutes). During the huddle, the PDMG provides a short brief on what has been accomplished since the last huddle, key activities that day, and any process interrupters they are encountering. Overall, huddle boards leverage visual management and allow for the sharing of information related to activities and potential issues. Many times this will be held via conference calls for PDMGs not in the field office. This is your daily communications platform with your team as a whole and potential your recipient POC, EHP or MIT.

### Your Lean Management Approach

Using lean tools such as the daily huddle board, the DILO/WILO schedule, and the Root Cause Problem Solving cards foster an environment focused on continuous improvement. As a task force leader in PA's lean management model, you are accountable as a facilitator of process efficiency from matching work with personnel skillsets to coordinating to resolve issues and streamline assistance.

### Continuous Improvement

Continuous improvement is an ongoing effort to improve products, services or processes. These efforts seek "incremental" improvement over time or "breakthrough" improvement all at once. The new PA Program delivery model utilizes Continuous Improvement through a Change Control process. Please participate in the Continuous Improvement process by identifying issues, opportunities, and feedback related to the new delivery model while performing your day to day work and submitting a Change Request at <https://portalapps.fema.net/apps/ORR/NewPA/Pages/SubmitRequest-CCT-P3.aspx>.

Within grants manager, once you click the down arrow by your name, a drop down box will appear then click feedback

