

K2306 EOC Resources Support Skillset Course

Student Manual

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FEMA

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Unit 1: Course Introduction and Overview

Visual 1: Welcome

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Unit 1: Course Introduction and Overview

Visual 2: Training Platform

- Training platform set up
- Logging in and out of the platform (navigating through pods, dialing in if using a bridge account)
- Navigation (chat, downloads, polls, etc.)
- Breakout group tools (whiteboards, sharing)



Visual 3: Parking Lot

- Questions we might need to come back to and revisit during our sessions
- Questions needing research or clarification
- Questions outside the scope of material



Visual 4: Introductions

Please turn your camera on to introduce yourself.

Please share your:

- Name
- Job title and jurisdiction
- EOC experience
- First word that comes to mind when you think about resources in an EOC



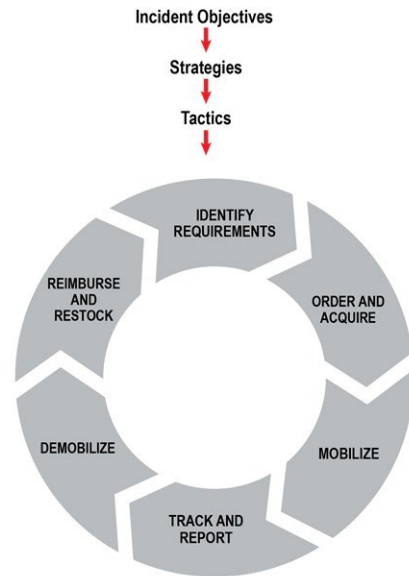
Visual 5: Course Agenda

Monday	Tuesday	Wednesday	Thursday	Friday
Unit 1: Course Overview Pre-Assessment Unit 2: NIMS Framework and EOC Organizational Structures Unit 3: EOC Facility Management	Unit 3: EOC Facility Management Unit 4: Understanding the Resource Requirement Unit 5: Resource Sourcing	Unit 5: Resource Sourcing Unit 6: Resource Ordering and Acquiring Unit 7: Resource Tracking	Unit 7: Resource Tracking Unit 8: Finance	Unit 9: Creating PTBs with EOC Skillsets Unit 10: Course Review Final Exercise Course Evaluation Post-Assessment

Visual 6: EOC Course Overview

The EOC Comprehensive Resource Management Cycle is the backbone of this course. The CRM cycle introduces each unit and how that unit fits into the CRM cycle, starting with:

- Understanding the Resource Requirement
- Resource Sourcing
- Resource Ordering and Acquiring
- Resource Tracking
- Finance



The EOC Comprehensive Resource Management Cycle is the backbone of this course. We will use the CRM cycle to introduce each unit and how that unit fits into the CRM cycle, starting with:



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- Unit 3 – EOC Facility Management
- Unit 4 – Understanding the Resource Requirement (Identify Requirements in the CRM Cycle)
- Unit 5 – Resource Sourcing (Order and Acquire in the CRM Cycle)
- Unit 6 – Resource Ordering and Acquiring (Order and Acquire and Mobilize in the CRM Cycle)
- Unit 7 – Resource Tracking (Track and Report and Demobilize in the CRM Cycle)
- Unit 8 – Finance (Reimburse and Restock in the CRM Cycle)

Unit 9 will discuss an EOC Position Task Book and Unit 10 will conclude the course with the summary and final activity.

Visual 7: Course Goal

The primary goal of this course is to provide:

- Practical learning experience on the EOC Skillsets associated with resources support tasks
- Responsibilities and processes involved in EOC resources
- Development of essential documentation
- Continual management of information across multiple agencies and personnel as it relates to effective EOC operations



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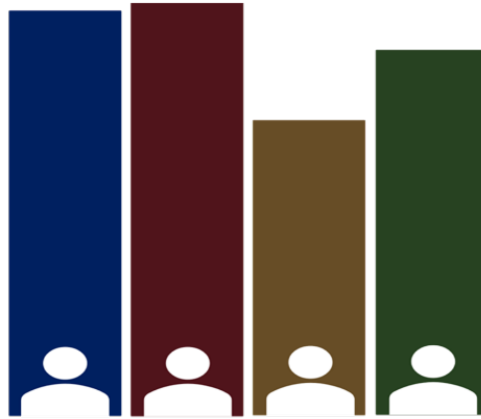
The primary goal of this course is to provide participants a practical learning experience on the EOC Skillsets associated with resources support tasks. This training will provide individuals in resource roles with a greater understanding of the responsibilities and processes involved in EOC resources, the development of essential documentation, and the continual management of information across multiple agencies and personnel as it relates to effective EOC operations.

Visual 8: Course Objectives

At the conclusion of this training, you will be able to:

- Describe the National Qualification System (NQS), the National Incident Management System (NIMS), and EOCs.
- Perform various tasks within the identified skillsets for Resources Support.
- Develop EOC resource documentation.
- Manage a variety of resource processes and procedures within the EOC.

Visual 9: Poll: Based on the Course Objectives, Which One Do You Think Would Help You Do Your Job Better?



Question:

Based on the course objectives, which one do you think would help you do your job better?

- Describe the National Qualification System (NQS), the National Incident Management System (NIMS), and EOCs.
- Perform various tasks within the identified skillsets for Resources Support.
- Develop EOC resource documentation.
- Manage a variety of resource processes and procedures within the EOC.



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Visual 10: Poll: Emergency Operations Center (EOC)

What is your experience in an EOC?

- I am new to EOCs! (0 - 3 years)
- I have moderate experience! (4 - 7 years)
- I have substantial experience! (8+ years)



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Question:

Which option listed describes your experience in an EOC?

- I am new to EOCs! (0 - 3 years)
- I have moderate experience! (4 - 7 years)
- I have substantial experience! (8+ years)

Visual 11: Student Course Materials

Student Manual contains:

- Printed Unit visuals
- Handouts
- Activities
- Action item



Visual 12: Pre-Assessment (20 minutes)

- Download and complete the “*Pre-Course Assessment*”.
- Once completed, participants can review the Student Manual until it is time to re-convene.



Visual 13: Questions

Are there any questions about this course?



Unit 2: National Incident Management System (NIMS) Framework and Emergency Operations Center (EOC) Organizational Structures

Visual 1: Unit 2: National Incident Management System (NIMS) Framework and Emergency Operations Center (EOC) Organizational Structures

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Unit 2: National Incident Management System (NIMS) Framework and Emergency Operations Center (EOC) Organizational Structures

Visual 2: Unit Two Objectives

At the conclusion of this unit, you will be able to:

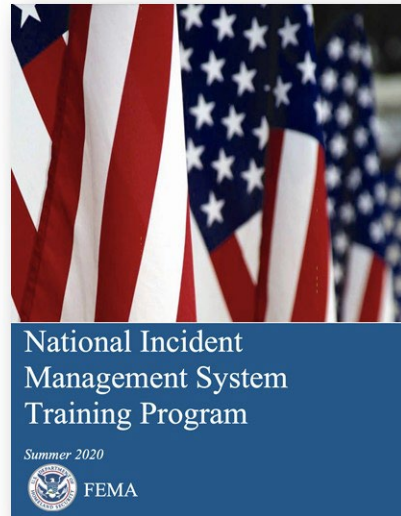
- Describe the National Incident Management System (NIMS).
- Explain the National Qualification System (NQS).
- Review the skillsets assigned to the course.

Visual 3: National Incident Management System

The National Incident Management System (NIMS) guides all levels of:

- Government
- Nongovernmental organizations
- Private sector

These organizations work together to prevent, protect against, mitigate, respond to and recover from incidents.



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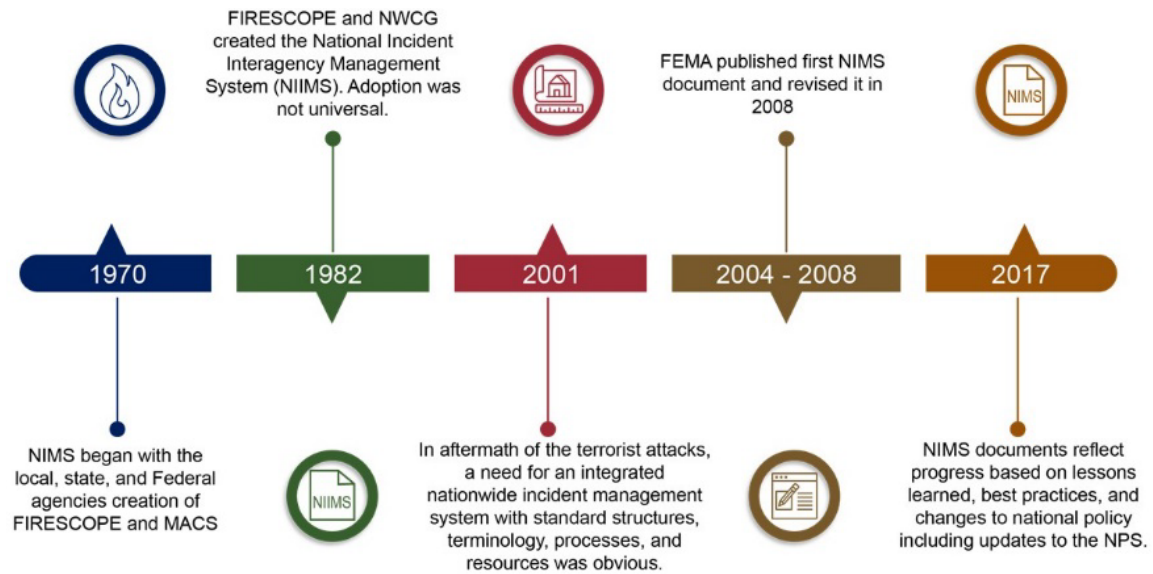
NIMS has 3 components of their framework that enable diverse organizations to integrate capabilities and achieve shared goals. The three (3) components are:

1. Resource Management
2. Command and Coordination
3. Communications and Information Management

NQS provides tools for field positions and the EOC Resources Support Skillsets.

Refer to the [NIMS Doctrine](#) and the [NIMS Guideline for the NQS](#) for more information.

Visual 4: History Review of NIMS



Visual 5: National Preparedness System

The National Preparedness System describes the capabilities used in the NIMS to ensure the successful delivery of all capabilities.

These capabilities consist of:

- Shared vocabulary
- Systems
- Processes

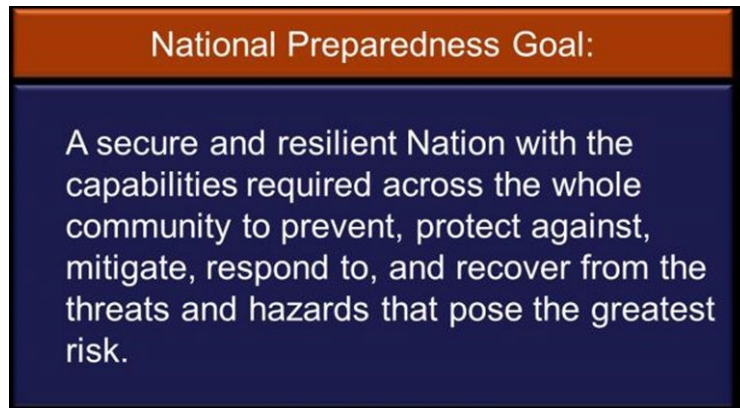
The NIMS defines operational systems that guide how personnel work together during incidents.



The National Preparedness System (NPS) outlines an organized process for everyone in the whole community to move forward with their preparedness activities and achieve the National Preparedness Goal. There are six parts to achieving the NPS:

1. Identifying and Assessing Risk
2. Estimating Capability Requirements
3. Building and Sustaining Capabilities
4. Planning to Deliver Capabilities
5. Validating Capabilities
6. Reviewing and Updating

Visual 6: National Preparedness Goal (NPG)



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Our security and resilience is demonstrated through the core capabilities that are necessary to deal with the risks we face. We use an integrated, layered, and all-of-Nation approach as our foundation for building and sustaining core capabilities and preparing to deliver them effectively.

Refer to the [NPG Doctrine](#) for more information.

Visual 7: National Preparedness Goal (NPG) – Mission Areas

The NPG describes five mission areas:

1. Prevention
2. Protection
3. Mitigation
4. Response
5. Recovery



Visual 8: National Preparedness Goal (NPG) – Core Capabilities

The core capabilities consist of 32 activities that address the greatest risks to the nation.

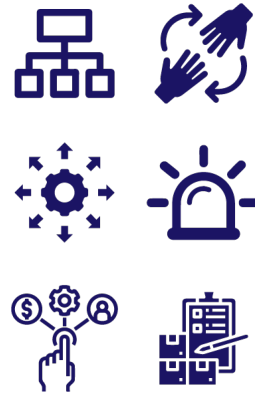
- The core capabilities are aligned to a capability target.
- These targets recognize that everyone needs the flexibility to determine how they apply their resources.
- This is based on the threats that are most relevant to them and their communities.



Visual 9: National Incident Management System (NIMS) Components

The NIMS guidance and tools components include:

- National Qualification System (NQS)
- Mutual Aid
- Incident Command System
- Emergency Operations Center
- Resource Typing
- Inventorying



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Communities across the nation experience a diverse set of threats, hazards, and events. The size, frequency, complexity and scope of these incidents vary, but all involve a range of personnel and organizations to coordinate efforts to save lives, stabilize the incident, and protect property and the environment.

Every day, jurisdictions and organizations work together to share resources, integrate tactics, and act collaboratively. Whether these organizations are nearby or are supporting each other from across the country, their success depends on a common, interoperable approach to sharing resources, coordinating and managing incidents, and communicating information. The National Incident Management System (NIMS) defines this comprehensive approach.

Visual 10: Class Discussion

What do you know or what experience do you have with the National Qualification System (NQS)?



Question:

What do you know or what experience do you have with the National Qualification System (NQS)?



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Visual 11: National Qualification System (NQS)

The National Qualification System (NQS) develops baseline qualifications for national incident personnel. The baseline qualifications consist of incident:

- Management
- Support
- Emergency management personnel



Visual 12: National Qualification System (NQS) Guidance

The NQS provides the Resource Management component the guidance and tools necessary to

- Qualify
- Certify
- Deploy

emergency personnel during an incident.



Visual 13: National Incident Management System – Mutual Aid

The NIMS Guideline for Mutual Aid provides an overview of common mutual aid practices that:

- Defines common terminology and processes
- Describes an approach for creating legal agreements and operational plans



Visual 14: Types of Mutual Aid

- Local Automatic Mutual Aid
- Local Mutual Aid
- Regional, Interstate, or Statewide Mutual Aid
- Interstate Mutual Aid – After Declaration
- Interstate Mutual Aid – Prior to or Without a Declaration
- International Mutual Aid



Student
Manual

1. **Local Automatic Mutual Aid** - Local automatic mutual aid agreements permit the automatic dispatch and response of requested resources without incident-specific approvals or consideration of entity boundaries.
2. **Local Mutual Aid** - Local mutual aid agreements between neighboring jurisdictions or organizations involve a formal request for assistance and generally cover a larger geographic area than local automatic mutual aid agreements do.
3. **Regional, Intrastate, or Statewide Mutual Aid** - Sub-state regional mutual aid agreements are between multiple jurisdictions that are often sponsored by a council of governments or a similar regional body.
4. **Interstate Mutual Aid – After Declaration** - Out-of-state assistance through formal state-to-state agreements that support the response effort.
5. **Interstate Mutual Aid – Prior to or Without a Declaration** - In some instances, jurisdictions may require additional resources from other states, tribes, or territories prior to a state or tribal emergency declaration, or when one is not appropriate. Since EMAC does not apply in those situations, jurisdictions need separate interstate agreements for such incidents or planned events.
6. **International Mutual Aid** - International mutual aid agreements are a legal means through which jurisdictions can share resources across an international border.

Refer to the [NIMS Guideline for Mutual Aid](#) for more information.

Visual 15: Class Discussion: NIMS, Resource Management, NQS, and Mutual Aid

Since EOCs do not have a standardized system, how do we use NIMS, resource management, NQS, and mutual aid to set a baseline?



Questions:

Since EOCs do not have a standardized system, how do we use NIMS, resource management, NQS, and mutual aid to set a baseline?



Student
Manual

How many types of mutual aid exist?

Visual 16: Incident Command System (ICS)

The Incident Command System (ICS) is a management system designed to:

- Enable domestic incident management
- Integrate a combination of facilities, equipment, personnel, procedures, and communications operating within a common organizational structure
- Enable incident managers to identify the key concerns associated with the incident



Student
Manual

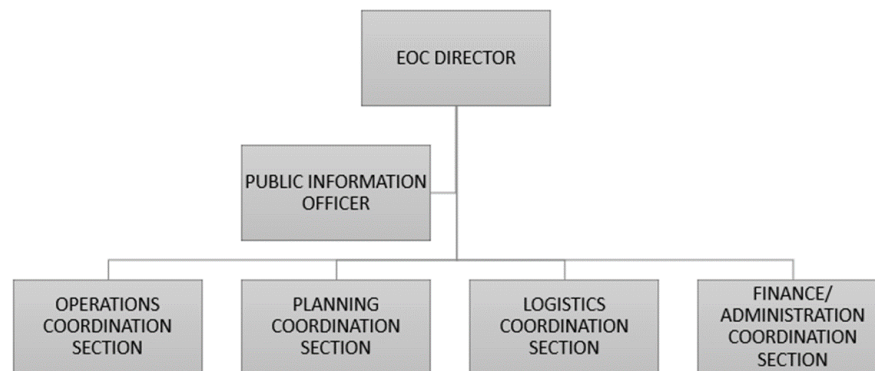
Remember:

NIMS is organized into three major components:

- Resource Management
- Command and Coordination - including the Incident Command System
- Communications and Information Management

Visual 17: Incident Command System and EOC Structure

- Used often
- Title modified for functions
- ICS processes modified to fit



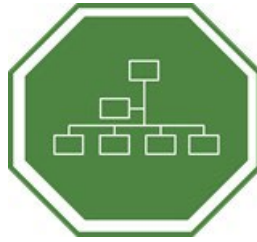
Student
Manual

ICS/ICS-like organization structure is a useful functional breakdown, particularly for EOCs that might take on operational missions. ICS and EOC personnel may agree to adjust responsibilities among the organizations to meet incident needs and fulfill resource and information requests. EOC leaders may opt for a standard ICS organization if:

- EOC staff are providing tactical direction to an incident.
- EOC management wishes to use ICS-trained personnel with no additional training requirements.
- EOC managers want to mirror the organization of on-scene personnel.

REFER to the [NIMS Doctrine](#) for more information on EOC organization structures.

Visual 18: Incident Command System Structure



Uses

- Familiar structure
- Mirrors organization of on-scene personnel
- Avoids additional EOC training requirements
- Supports situations when EOC staff may provide tactical direction

Question:

What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 19: Incident Command Resource Management



Resource Management

- May adapt resource management processes
- EOC defines coordination and tracking of resource ordering functions
- Logistics focus may be on advance resource ordering
- Operations may order departmental resources
- Operations may track incident resources

Question:

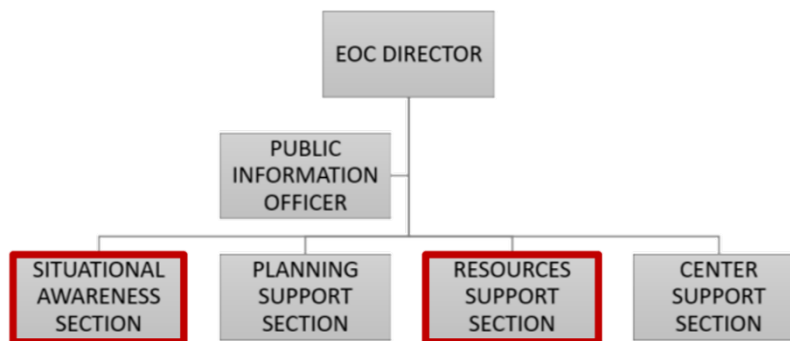
What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 20: Incident Support Model (ISM) Structure

- Focus
 - Information
 - Planning
 - Resource Support
- Situational Awareness and Resources Support are their own sections
- Functions combined



Student
Manual

The Incident Support Model (ISM) organizational structure is a variation of the ICS structure that:

- Separates the Information Management/Situational Awareness function from the ICS Planning Section.
- Combines the functions of the ICS Operations and Logistics Sections and Comptroller/Purchasing functions from the ICS Administration/Finance Section.
- Creates a Center Support Section and Resource Support Section.

Visual 21: Uses of ISM Structure



Uses

- Focus on support functions
- Situational Awareness Section –EOC Director
- Resources Support Section:
 - Operations
 - Logistics
 - Comptroller/Purchasing
- Streamlines resource sourcing, ordering, and tracking
- Not organized for response and recovery efforts

Question:

What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 22: ISM Resource Management



Resource Management

- One-Stop - acquiring, deploying, and tracking
- Resources Support Section:
 - Ordering
 - Tracking
 - Funding
 - Reimbursement
- Organizational and Functional Representatives:
 - Resources
 - Expertise
 - Relationships

Question:

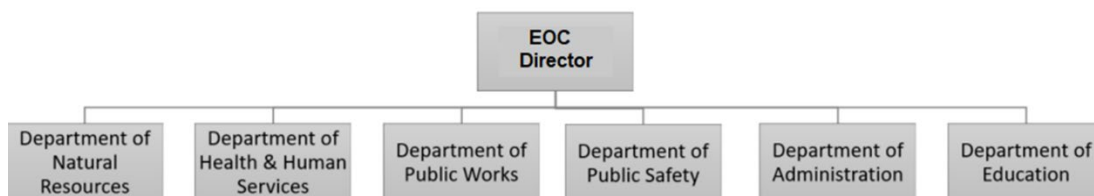
What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 23: Departmental Structure

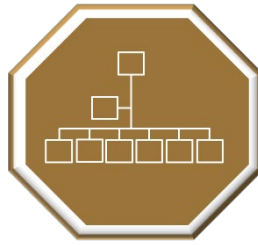
- Day-to-day structure
- EM/Senior Official coordinates efforts
- Function with little prep or startup
- Can use Emergency Support Functions (ESFs) instead of departments



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Departmental organization structure - organizations or jurisdictions may configure the personnel who assemble in the EOC by the participants' departments, agencies, or organizations. Such departmentally structured EOCs typically require less training and emphasize coordination and equal footing for all departments and agencies. In this model, a single individual (either the jurisdiction, organization's emergency manager, or another senior official) directly coordinates the jurisdiction's support agencies, NGOs, and other partners.

Visual 24: Uses of Departmental EOC Structure



Uses

- Emergency Manager/EOC Director directly facilitates EOC
 - Planning
 - Reporting
 - Requests
 - Possibly EOC Logistics

Question:

What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 25: Departmental EOC Resource Management



Resource Management

- Have EOC roles and responsibilities
- Maintain normal authorities, responsibilities, and relationships
- Bring own resources, expertise, and relationships to EOC

Question:

What are a few advantages and disadvantages of this structure?



Student
Manual

Visual 26: Poll: In Which of These Structures Have You Worked?

- A. Incident Command System (ICS)/ICS-Like Structure
- B. Incident Support Model (ISM) Structure
- C. Departmental Structure
- D. Other (specify)

Visual 27: Emergency Operations Centers (EOC)

Jurisdictions establish Emergency Operations Centers (EOC) to meet their unique requirements and needs based on an incident.

- All EOCs are established differently based on the incident and the jurisdiction.
- EOCs are built in accordance with the NIMS.



Visual 28: Review Characteristics of an EOC

- Collect, analyze, and share information.
- Collect resource needs and requests, including allocation and tracking.
- Coordinate plans and determine future needs.
- Perform coordination and policy direction.



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To help your EOC run smoothly, it's important to understand and know the characteristics of an EOC. That includes:

- Collect, analyze, and share information.
- Collect resource needs and requests, including allocation and tracking.
- Coordinate plans and determine future needs.
- Coordination and policy direction.

Visual 29: NQS and EOCs – Typing of Personnel Resources

- NQS Job Titles and Position Descriptions
 - Position Task Books for ICS Field Positions
- EOC Skillsets
 - Position Task Books for EOCs



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The NQS uses job titles, position descriptions, and the Resource Typing Library Tool (RTLTL) to create a Position Task Book (PTB) for needed field personnel. EOCs use the EOC Skillsets to create PTBs for EOC personnel.

Visual 30: Do EOCs Need to Be Scalable?

Why do EOCs need to be scalable?

How do we ensure EOCs are scalable?



Questions:

Why do EOCs need to be scalable?



Student
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How do we ensure EOCs are scalable?

Visual 31: Class Discussion: EOC Operational Coordination and Communication

With your group, share your thoughts on the following question:

Are Operational Coordination and Operational Communication important core capabilities for an EOC? Provide 2 real-life examples to support your claim.



Operational Coordination for all mission areas. Establish and maintain unified and coordinated operational structure and process that appropriately integrates all critical stakeholders and supports the execution of core capabilities. **Operational Communications for response mission area.** Ensure capacity for timely communications, supporting security, situational awareness, and operations among and between affected communities in impact area and all response forces.

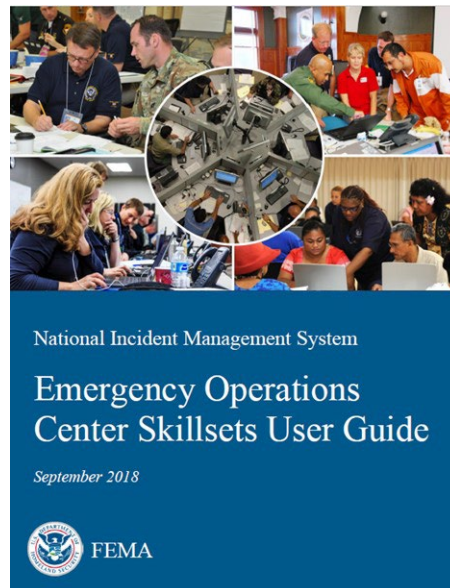
Question:

Are Operational Coordination and Operational Communication important core capabilities for an EOC? Provide 2 real-life examples to support your claim.



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Visual 32: EOC Skillsets User Guide



Student Manual

The EOC Skillsets User Guide provides a flexible approach to EOC qualifications, helping to build position qualifications according to one's organizational needs and resources. It also helps create a national vocabulary so that you can clearly communicate desired capabilities when you need to request additional personnel to support your EOC. The User Guide is for use by EOC personnel at any level of government and within the private sector and nongovernmental organizations (NGO). It explains what EOC Skillsets are and how to use them to construct EOC Position Task Books (PTB), supporting the qualification and certification of EOC personnel.

Refer to the [EOC Skillsets User Guide](#) for more information.

Visual 33: EOC Resource Skillsets

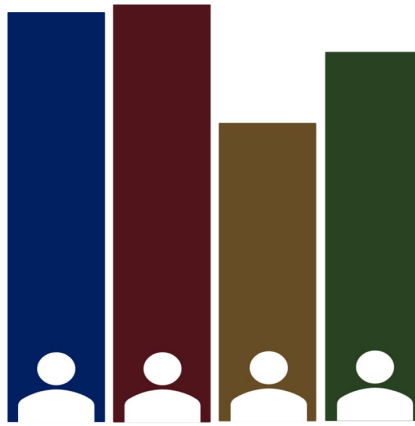
This course will cover six EOC Skillsets with multiple task categories:

1. Facility Management
2. Understanding the Resource Requirement
3. Resource Sourcing
4. Resource Ordering and Acquiring
5. Resource Tracking
6. Finance



Visual 34: Poll

Which of the six skillsets and/or tasks will be most beneficial to your accomplishment of resources in your EOC role?



Visual 35: Unit Two Summary

Congratulations! We have reviewed the following:

- National Incident Management System (NIMS)
- National Qualification System (NQS) and how it benefits an Emergency Operations Center (EOC)
- Emergency Operations Center (EOC) structures
- Resources Skillsets



Unit 3: Emergency Operations Center (EOC) Facility Management

Visual 1: Unit 3: Emergency Operations Center (EOC) Facility Management

K2306 EOC Resources Support Skillset Course

Unit 3: Emergency Operations Center (EOC) Facility Management

Visual 2: Unit Three Objectives

At the conclusion of this unit, you will be able to:

- Describe an operational EOC facility.
- Explain the differences between a Cold EOC and a Hot EOC.
- List the steps to secure an EOC facility.

Visual 3: Class Discussion

What does it take to establish an operational EOC?



Question:

Based on what you have learned thus far and/or your previous experience with EOCs, what does it take to establish an operational EOC?



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Visual 4: Emergency Operations Center (EOC)

The physical or virtual location at which the coordination of information and resources to support incident management (on-scene operations) activities, takes place. An EOC may be:

- Temporary facility
- More central or permanently established facility
- Higher level of organization within a jurisdiction

A huge factor for an EOC is facility management.



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The physical or virtual location at which the coordination of information and resources to support incident management (on-scene operations) activities. An EOC may be a temporary facility or may be in a more central or permanently established facility, perhaps at a higher level of organization within a jurisdiction. EOCs may be organized by major functional disciplines (e.g., fire, law enforcement, medical services), by jurisdiction (e.g., Federal, State, regional, tribal, city, county), or by some combination thereof. An emergency operations center (EOC) is designed to support:

- Emergency response and recovery
- Continuity of operations – ask are they using COG or COOP? If neither, ask what are they using withing their EOC?
- Crisis communications activities

Visual 5: Emergency Operations Center (EOC), Continued

The EOC supports the following incident management functions.



The EOC supports the following incident management functions:



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- **Activation** – Bring knowledge and expertise together to deal with events that threaten the business.
- **Situation Analysis** – Gather information to determine what is happening and to identify potential impacts.
- **Incident Briefing** – Efficiently share information among team members.
- **Incident Action Plan** – Provide a single point for decision-making and decide on a course of action for the current situation.
- **Resource Management** – Provide a single point of contact to identify, procure and allocate resources.
- **Incident Management** – Monitor actions, capture event data and adjust strategies as needed.

Visual 6: Activate an EOC



The five phases of opening/activating an EOC, to include initiating EOC personnel notification, are as follows:



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1. Initiate the EOC alert and activation procedures.
2. Determine activation level and necessary staffing based on initial information gathering and established guidelines/plans.
3. Utilize information you gather from guidelines/plans to determine staffing needs.
4. Coordinate with EOC facility management to ensure the EOC infrastructure is operational.
5. Determine your support needs.

Visual 7: Questions to Consider When Activating an EOC

All EOC personnel should be aware of:

- Who makes the decision to activate the EOC?
- What are the circumstances for activation?
- When activation occurs?
- How are the levels defined by the jurisdiction?
- How is the appropriate level of activation determined?



The decision-making process for EOC activation should be documented in policy.

All personnel need to be aware of the responses to these questions when activating an EOC:

- Who makes the decision to activate the EOC?
- What are the circumstances for activation?
- When activation occurs?
- How are the levels defined by the jurisdiction?
- How is the appropriate level of activation determined?



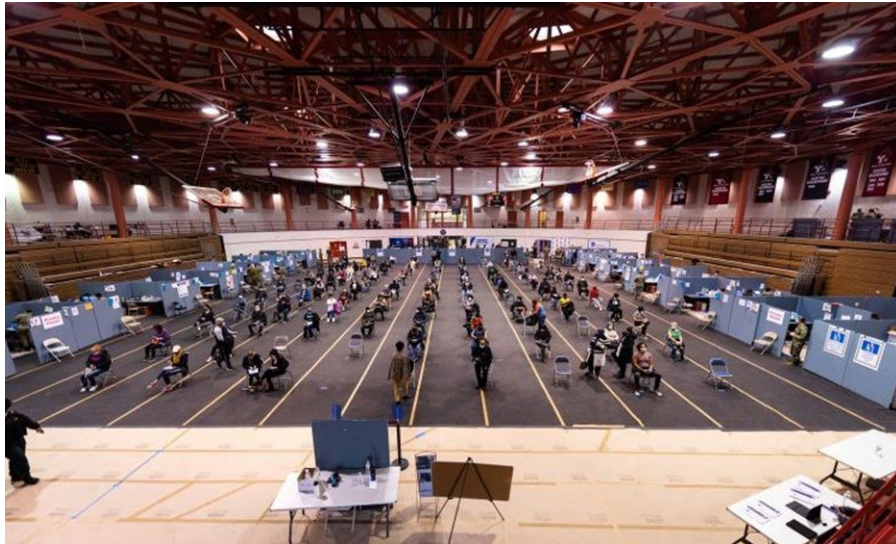
Student
Manual

The decision-making process for EOC activation should be documented in policy.

Refer to your previous unit notes and exercises for answers to the questions.

The goal of this slide is to know and understand the answers to these questions when activating your EOC based on an event.

Visual 8: Obtain EOC Facility Policy, Plans, or Supporting Documents



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These documents should be updated based on the following guidelines:

- Incident specific
- Hard copy of relevant forms
- Checklists

Visual 9: Operational EOC Factors

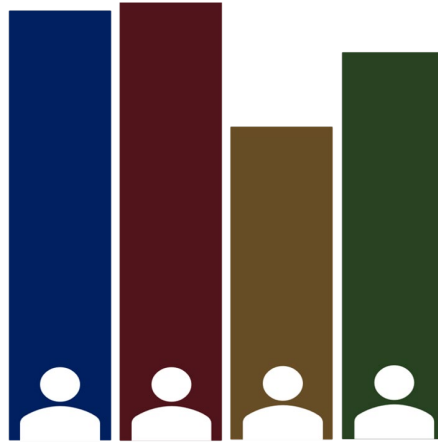
An effective operational EOC should include the following factors:

- Likely Threats and Hazards the jurisdiction faces
- EOC Organizational Structure
- Personnel/Staffing Requirements
- Facility Requirements
- Equipment Requirements
- Established EOC Authorities and Procedures
- Communications



Visual 10: Poll

Have you held a role in which you were responsible for activating and/or completing tasks to activate an EOC?



Visual 11: Facility Management Role in an EOC

As an EOC resources support leader, it's important to understanding the need for key building maintenance support locations.



An **EOC** in some cases can consist of a large conference room and primary team meeting location. It must be equipped with furniture, telephone, and internet access and be near photocopiers, network printers, fax machines and other office equipment. The conference room or other space to be used as the EOC should be equipped with the following equipment and supplies:

- Communications equipment including sufficient telephones (cell and landline with at least one speakerphone) to handle incoming and outgoing calls; incoming and outgoing fax machines; and access to any radio systems used by the business
- Computers and printers with access to network resources (including electronic copies of emergency response, business continuity and crisis communications plans that can be printed on demand), electronic mail and the internet
- Information gathering and display tools including access to broadcast radio and television (preferably with recording capability) or internet news sources; white boards, TV monitors, projection units or flipcharts with easel and markers to compile and display information
- Hard copies of emergency response, business continuity and crisis communications plans, contact/telephone lists, resource inventory and diagrams of facilities and systems
- Stationery, business and incident management forms, pens, pencils, markers and supplies
- Food, water, and dining supplies for EOC staff

Refer to <https://www.ready.gov/incident-management> for more information.



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Visual 12: EOC Facility Support

In a resources support role, you should be knowledgeable of all aspects that make up a facility.

This includes:

- Information Technology (IT)
- Maintenance
- Contracts
- Catering
- Janitorial services
- Maintaining on-hand supplies



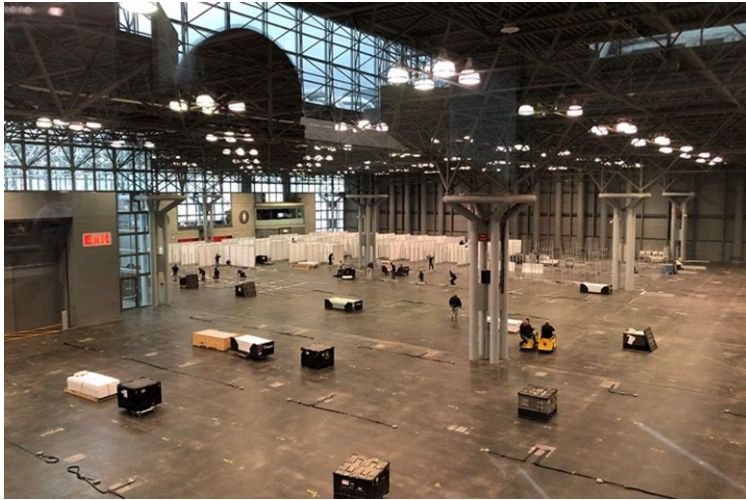
Visual 13: EOC Facility Management Task Categories

There are three (3) task categories that fall under EOC Facility Management.

1. Ensure that EOC infrastructure is operational
2. Support the needs of EOC personnel
3. Ensure security of the EOC



Visual 14: 1. Ensure that EOC Infrastructure is Operational



Visual 15: Task Category One: EOC Infrastructure Operational

There are tasks to ensure that the EOC infrastructure is operational.

- Demonstrate knowledge of key building maintenance support locations
- Ensure adequate communications access
- Adapt facility setup to meet EOC needs
- Ensure that the facility is accessible
- Ensure that communications systems, such as data, voice, and video, are secure, protected, and redundant, as appropriate
- Coordinate facility demobilization when EOC team is deactivated



Visual 16: Key Building Maintenance Support Locations

The first task is to demonstrate knowledge of key building maintenance support locations, such as:

- Water/gas shutoffs
- Electrical panels
- Alarm panels
- Heating, ventilation, and air conditioning (HVAC) systems
- Closed-circuit TV cameras
- Communications towers
- Backup generators
- Fuel storage
- Fire extinguishers



Visual 17: Demonstrating Facility Management Knowledge

To demonstrate knowledge in an EOC resources support role, you should be able to:

- Identify the maintenance support locations
- Know who the facilities unit leader is or point of contact is for your EOC
- Identify any standard operating procedures around building maintenance or facility operations for your EOC
- Partner and collaborate with key stakeholders from your EOC to develop standard operating procedures regarding building maintenance or facility operations



To demonstrate knowledge in an EOC resources support role, you should be able to:

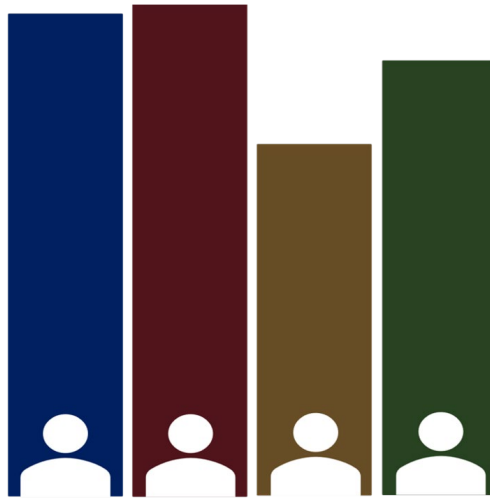


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- Identify the maintenance support locations
- Know who the facilities unit leader is or point of contact is for your EOC
- Identify any standard operating procedures around building maintenance or facility operations for your EOC
- Partner and collaborate with key stakeholders from your EOC to develop standard operating procedures regarding building maintenance or facility operations

Visual 18: Poll

How important is building maintenance and support locations building maintenance when activating and running an EOC?



Visual 19: Ensure Adequate Communications Access

The next task is to ensure adequate communications access.

This means activating all communications access for an EOC to be fully operational, such as:

- Coordinate with Information Technology (IT) and communications services to meet facility and staff needs
- Coordinate facility communications requirements with EOC leadership



The next task is to ensure adequate communications access and ensure that communications systems are secured, protected, and redundant.

This includes:

- Data
- Voice
- Video



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When activating an EOC all communications access must be fully operational, such as:

- Coordinate with Information Technology (IT) and communications services to meet facility and staff needs.
- Coordinate facility communications requirements with EOC leadership.

Visual 20: Communication Requirements

The EOC's ability to function depends on its ability to communicate.

- Voice and data communications in and out of the EOC must be reliable to ensure that information and critical decisions can transfer quickly to the correct personnel.
- The EOC design must also facilitate face-to-face communication to optimize EOC efforts.



Visual 21: Interoperability within an EOC

Interoperability allows you to communicate with other EOCs, for example, State, Federal and Local EOCs. This also includes jurisdictions primary response communications systems:

- Police
- Fire
- Medical services radio systems

These first responders are accustomed to communicating with each other and with 911 dispatchers, whether the 911 center is co-located with the EOC, or not.



Questions

1. How many of you believe that your jurisdictions' communications are interoperable?
2. How do you know?



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Visual 22: Interoperability within an EOC and First Responders

Communications in an EOC should be integrated and expanded to include emergency operation agencies that respond alongside first responders based on the state, county, and municipal agencies. These include:

- First receivers at hospitals
- Triage centers
- Mass care shelters
- Special needs shelters
- Educational facilities
- Specialized operations centers



Visual 23: Telecommunications – Conferencing, Messaging, and Fax

The EOC should have adequate telephone extensions and fax capabilities for full operations.

- Landline capabilities
- Voice over Internet Protocol (VoIP)
- Digital systems
- Other reliable voice and data communications options as a primary system



Visual 24: Telecommunications – Cellular and Pager Service

Cellular and pager service is important for personnel working remotely:

- Traveling among neighboring EOCs
- Joint Field Offices (JFO)
- Incident scenes



Visual 25: Public Safety Radio

An EOC facility unit leader is responsible for managing all communication access including public safety radios. If this is included in your EOC, consider:

- Will the installation be temporary (requiring handheld radios) or permanent (requiring a radio base station)?
- If agencies provide the radios, will they require power and antenna hookups for extended operations?
- Will radios be available in the Operations Room (Ops Room) or monitored in a separate communications room?
- Will different radio systems create interference with each other?
- Does the EOC have enough electrical outlets for all the expected equipment?
- Are chargers necessary for radios, cell phones, and pagers

Visual 26: Information Technology Requirements

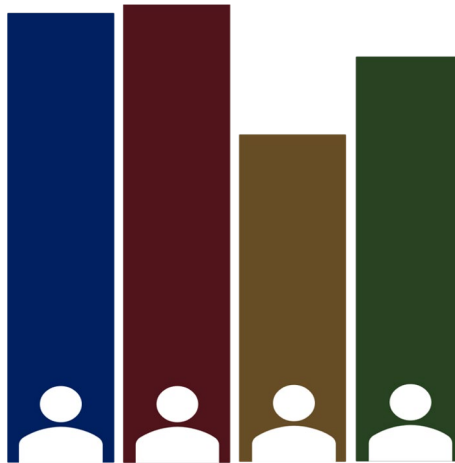
Understanding the EOC functions allows the facilities management unit leader to determine the technology required to perform those functions.

In addition to communications requirements, successful EOC activity relies heavily on modern digital technology.



Visual 27: Poll

Where does facility management exist in your organizational construct?



Visual 28: Internet Connectivity

An EOC must be equipped with ability to:

- Access and change websites
- Publish blog posts
- Provide releases via streaming video and audio

An EOC should include space and system requirements to enable these capabilities.



Visual 29: Internet Connectivity, Continued

Functioning internet capability usually requires power (electricity) and an Internet Service Provider (ISP).



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Manual

IT redundancy considerations are an important part of planning and preparedness; therefore, several options should be:

- Identified
- Evaluated
- Acquired
- Tested prior to activation

Visual 30: Mobile Wi-Fi Connectivity

Mobile Wi-Fi options include:

- Mobile Wi-Fi Hotspots
- Portable Routers and Boosters
- Mobile Broadband USB Stick
- Relocating to a designated secondary or alternate EOC location



Visual 31: Backup Measures to Ensure Connectivity

- Redundant communications should have satellite internet for when everything else fails.
- Mesh networks (typically built on the fly) allow low bandwidth internet connectivity via hand.



Visual 32: Adapt Facility Setup to Meet EOC Needs

The next task is to adapt facility setup to meet EOC needs.

The facility should be setup and equipped to meet the needs of the EOC.



Visual 33: Facility Setup to Meet EOC Needs Backup

Adapting a facility setup to meet the needs of an EOC means whether your EOC is one of the following:

- Room in a building
- The actual building
- A business/store
- Virtual environment

It should be equipped with everything that the EOC needs to be active or Hot. This includes redundancy plans and backup equipment.



Visual 34: Equipment Requirements

An EOC should be equipped with all necessary furniture and office equipment.

- Desks
- Chairs
- Conference room furniture and equipment
- Storage units



Visual 35: Ensure Facility Is Accessible

The next task is to ensure that the facility is accessible:

- Ensure staff can get to it in a disaster.
- Coordinate reasonable accommodations for those with access and functional needs.
- Provide adequate parking, if necessary.



Visual 36: Facility Setup and Accessibility

An EOC should be setup to accommodate all staff. This includes:

- People first language
- Staff with unique needs
- Accessible entry ways throughout the facility
- Parking
- Handicap Parking
- Walkways



Student
Manual

Question:

What other considerations can you think of when activating an EOC based on accessibility?

Visual 37: Coordinate Facility Demobilization when EOC is Deactivated

The last task is to coordinate facility demobilization when the EOC team is deactivated.

The EOC team is deactivated when the incident is over and the EOC no longer must provide support to first responders.



Visual 38: EOC Facility Demobilization

It is important for an EOC to have a Demobilization Plan that was developed by a Planning Cell of some sort (depending on the setup being used).

It is important to conduct a Hot Wash meeting during demobilization to ensure you achieve the following:

- Obtain personnel feedback
- Normalize the setup and break down of an EOC as an incident winds down and in an emergency when the EOC must move
- Develop best practices
- Review lessons learned

Visual 39: Cold, Warm, or Hot EOC

Facilities designated as primary and alternate EOC locations have three (3) status levels:

1. Cold
2. Warm
3. Hot

Based on the status level, determines whether an EOC is fully operational or not.



Visual 40: Levels of EOC Readiness Examples

Facilities designated as primary and alternate EOC locations serve day-to-day functions such as:

- Meeting and conference rooms
- Training facilities

Status	Activation Level	EOC Staffing Level	Activities	Notes
Cold	N/A	None	Stand-By	EOC is not set up or configured for operations
Warm	N/A	None	Stand-By	EOC is set up but not staffed
Hot	See Below	See Below	See Below	EOC is set up and staffed as noted below.

Visual 41: SEMS and NIMS Levels of Readiness

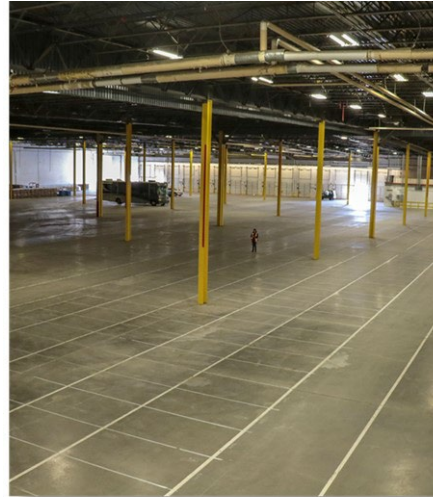
The Standardized Emergency Management System (SEMS) and NIMS utilize the following criteria to determine the levels of readiness for an EOC.

What	Level 1	Level 2	Level 3
NIMS	Full – All Personnel	Partial – Key personnel and personnel from responding agencies	Monitor – Key personnel only
SEMS	Minimal – EOC Director and P/I Coordinator	Partial – EOC Director, Section Coordinators, Branch and units as needed	Full – All EOC positions

Visual 42: Breakout Group Exercise One: Converting a Cold EOC to a Hot EOC

With your group, complete the following action items:

1. Read through the scenario.
2. Discuss and create a checklist to activate your EOC.
3. Prepare to discuss the checklist with the class.



Student
Manual

Activity:

With your group, complete the following action items:

1. Read through the scenario.
2. Discuss and create a checklist to activate your EOC.
3. Prepare to discuss the checklist with the class.

Visual 43: 2. Support the Needs of EOC Personnel



Visual 44: Task Category Two: EOC Personnel Support

Task category two is supporting the needs of EOC personnel. This includes:

- Provide for maintenance and sanitation supplies and support.
- Order EOC logistical support resources as necessary, such as food, office supplies, and kitchen supplies.



Visual 45: Medical and Sanitary Supply Requirements

Medical supplies are limited to those required for a dispensary-type operation.

On-hand sanitary supplies should meet the needs of assigned EOC staff for a two-week period.

Proper, adequate Personal Protective Equipment (PPE) should also be available.



An EOC should keep enough supplies on hand to conduct efficient emergency operations and support janitorial services for at least a two-week period.

Administrators should keep the following on hand:

- Hard copy of relevant forms
- Documents
- Checklists



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Proper, adequate Personal Protective Equipment (PPE) should also be available, along with training or instructions on:

- Storage
- Handling
- Use
- Application
- Disposal

REMEMBER: You can make suggestions for new the COVID environment or based on a new incident. Also, consider resources from the OSHA (or state versions of OSHA) on decor and cleaning needs. Check with local Health Department for environmental guidance (proper disposal of resources, etc., if appropriate).

Visual 46: Kitchen and Food Requirements

An EOC should be equipped to feed the personnel, such as:

- Outside caterers
- Standby contracts with local NGOs that maintain kitchens
- Prepackaged emergency food supplies such as meals ready to eat (MRE)
- Commercial foods with a relatively long shelf life



REMEMBER: Supplies and equipment requirements are defined in the [NIMS EOC How-To Quick Reference Guide](#). Furniture and Office Equipment EOCs provide all necessary furniture and office equipment. Food Supply EOCs can feed their personnel in a number of ways, such as through outside caterers, standby contracts with local NGOs that maintain kitchens, or stored foods. This includes:

- Prepackaged emergency food supplies such as meals ready to eat (MRE)
- Commercial foods with a relatively long shelf life

Staff should ensure that stored food products meet certain storage requirements and should rotate them based on expiration dates.



Student
Manual

Keep in mind, as with all tasks, these may be situational depending on the magnitude or complexity of the incident (e.g., may need to stockpile food).

You may consider providing a checklist of resources that might commonly be found in the EOC that would need to be replenished for the next event.

QUESTION:

What would you add on a checklist regarding logistical support, based on your EOC?

Visual 47: Support Services for Facility Management

An EOC requires support services, and the demand for these services may increase during activation.

The EOC may also need other support services, such as:

- Catering
- Trash pick-up
- Construction



Visual 48: 3. Ensure Security of the EOC



Visual 49: Task Category Three: EOC Security

Task category three is ensuring security of the EOC. This includes:

- Establish facility access control and accountability.
- Coordinate with law enforcement and other security organizations.
- Ensure implementation of facility security measures.
- Help meet EOC operational security requirements for sensitive materials.

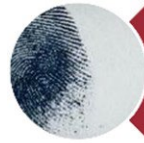


Visual 50: EOC Facility Security

To ensure the security of an EOC, it's important to establish facility access control and accountability.

This includes coordinating with:

- Law enforcement
- Security organizations



Controlling access or access cards



Visiting procedures or being escorted by an actual employee



Locked door procedures versus unlocked doors

You must be accountable for personnel, so establishing security and protocols for access and accountability is necessary. Typically, this means having a sign-in process for visitors entering the facility and/or a badging process.

You may have more levels of security based on the location of the facility (like if it's on a military base) and based on the incident (like if it's for civil unrest).

Facility units provide:



Student Manual

- Incident personnel with incident facilities
- Determines requirements for facilities
- Secures facilities and provides layouts
- Supervises security manager and base/camp manager

There should be a security policy, process, and procedures in place for entry into an EOC. This process should be enforced daily. For example:

- No buddy badging
- No holding the door
- Include details on providing resources and space for law enforcement needs (even sensitive needs).
- Check with Fusion Centers for details on facility hardening considerations

Visual 51: EOC Operational Security

EOC facility leaders should help meet EOC operational security requirements, such as:

- Providing shredders
- Providing storage containers for sensitive materials



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The security categories for access to sites and information include:

- Classified information - highest classification
- Protected Infrastructure Information (PII)
- HIPPA
- FOIA
- Sunshine laws
- State laws – for example, public record disclosure (laws may vary at this level)

Visual 52: Breakout Group Exercise Two: Securing an EOC

Review the scenario based on COVID 19. After reviewing the scenario develop responses with your group, complete the action steps to help secure an EOC:

1. Your existing security protocols must now be adapted to the new environment based on the scenario. How do you modify your procedures and document them?
2. Should these procedures change to reflect the changing pandemic situation?



Action Steps Based On Scenario

With your group, complete the action steps to help secure an EOC:

Review the scenario based on COVID 19. After reviewing the scenario develop responses with your group, complete the action steps to help secure an EOC:



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- Your existing security protocols must now be adapted to the new environment based on the scenario.
- How do you modify your procedures and document them?
- Should these procedures change to reflect the changing pandemic situation?

Visual 53: Unit Three Summary

Congratulations! We have reviewed the following:

- Operational EOC facility
- Requirements for activating an EOC
- EOC facility management tasks and task categories
- Differences between a Cold EOC and a Hot EOC
- Securing an EOC facility



Unit 4: Understanding the Resource Requirement

Visual 1: Unit 4: Understanding the Resource Requirement

K2306 EOC Resources Support Skillset Course Unit 4: Understanding the Resource Requirement

Visual 2: Unit 4 Objectives

At the conclusion of this unit, you will be able to:

- Describe a resource requirement as it relates to an EOC.
- Analyze and validate a resource requirement.
- Identify an unrequested resource based on the capability.
- Discuss a resource requirement using FEMA national standards and common terminology.
- Organize and support resource management and coordination.

Visual 3: Class Discussion

Understanding an EOC resource requirement is a key component to the operation of an EOC.

Why do you think this Skillset is important to the operation of an EOC?



Question:

Understanding an EOC resource requirement is key to the operation of an EOC. Why do you think this Skillset is important to the operation of an EOC?

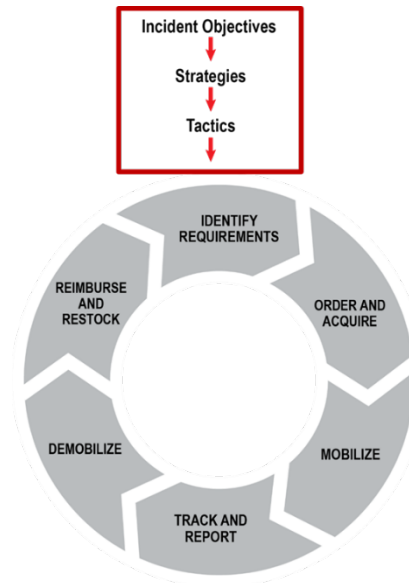


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Visual 4: Comprehensive Resource Management

The CRM cycle begins with these key items to help to identify requirements:

- Incident objectives
- Strategies
- Tactics



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Everything with an incident that needs “stuff” starts with understanding Comprehensive Resource Management, or CRM. This is a review from ICS 100, but we will cover each of these sections a bit more in depth over this unit.

Visual 5: Implement a Resource Management Process

Implementing a resource management process is crucial to understanding resource requirements. A resource management process includes:

- Using forms
- Following timelines
- Identifying responsible parties

KEY: Use national standards and common terminology to promote ease of use of the process.



Visual 6: Different Resource Ordering Processes

Separate entities may have separate ordering processes.

It is important to remember those different processes such as:

- Mutual Aid
- Wildfire Resources
- Emergency Vehicle Operations processes



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The key is to try and retrieve the ordering process. Keep in mind, the information/process may be available at the National level.

NOTE: We will discuss this further in the Resource Ordering and Acquiring unit.

Visual 7: Resource Management Primary Tasks

Resource Management consists of primary tasks that should be performed for every incident resource.

These tasks consist of:

- Identify requirements
- Order and acquire
- Mobilize
- Track and report
- Demobilize
- Reimburse and restock



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This is a sequence of tasks for each resource. During an incident it is possible that these tasks will be conducted simultaneously. One resource can be in ordering and acquiring while another may be in the demobilization stage.

During an incident EOC personnel must continually identify, validate, and refine resource needs. This process involves the CSALTT concept.

Visual 8: Implement a Resource Management Process

During an incident EOC personnel must continually:

- Identify
- Validate
- Refine resource needs

Resource management and their affiliated organizations should coordinate, communicate, and collaborate as closely and much as possible, both in advance of and during an incident.



Visual 9: Implement a Resource Management Process, continued

There should be crucial documents in place that align to the Resource Management Process, such as:

- Incident Plan
- SOPs
- Checklists

Emergency Support Function 15 - External Affairs Standard Operating Procedures (SOP)
Basic Plan

References:

- A. Homeland Security Presidential Directive 5 (HSPD-5)
- B. National Response Framework (NRF)
- C. National Disaster Recovery Framework (NDRF)
- D. National Incident Management System (NIMS)
- E. FEMA Incident Management Team (IMT-205)

NOTE TO USERS: This SOP is for the purpose of this exercise. It is not intended to be used in a real-world situation. It is intended to be used in a training exercise.

Incident Briefing

Purpose: The Incident Briefing (ICB 205) provides the Incident Commander (and the Command and Control Staff) with essential information regarding the incident situation and the resources allocated to the incident. It serves as a starting point for the Incident Commander to develop an incident action plan.

Preparation: The Incident Briefing is prepared by the Incident Commander for presentation to the Incident Commander, Command and Control Staff, and other personnel.

Content: The ICB 205 is organized and distributed before the Incident Briefing of the Command and Control Staff or other personnel as appropriate. The "Incident" and "Command and Control" sections are organized by "Incident" and "Command and Control" sections. The "Incident" section is organized by "Incident" and "Command and Control" sections. The "Command and Control" section is organized by "Incident" and "Command and Control" sections.

Notes:

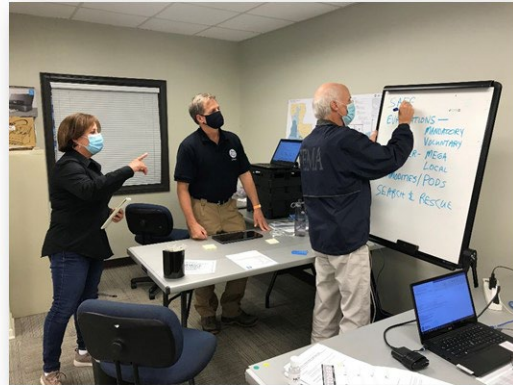
- The ICB 205 can serve as part of the Incident Action Plan (IAP).
- The ICB 205 can serve as part of the Incident Action Plan (IAP).

Block	Block Title	Instructions
1	Incident Name	Enter the name assigned to the incident.
2	Incident Location	Enter the location assigned to the incident.
3	Incident Status	Enter the status assigned to the incident (e.g., Active, Standby, etc.).
4	Incident Description	Enter the description of the incident, including the nature of the incident, the location, the time, and the status. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location.
5	Incident Summary and Status	Enter the summary and status of the incident, including the nature of the incident, the location, the time, and the status. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location.
6	Incident Summary and Status	Enter the summary and status of the incident, including the nature of the incident, the location, the time, and the status. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location.
7	Incident Summary and Status	Enter the summary and status of the incident, including the nature of the incident, the location, the time, and the status. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location. If the incident is a multi-incident, enter the name of the incident and the location. If the incident is a single incident, enter the name of the incident and the location.

Visual 10: Understanding the Resource Requirement Task Categories

There are two (2) task categories for understanding a resource requirement:

1. Understand and validate the resource requirement
2. Communicate requirement in plain language and use national standards and common terminology



Visual 11: Task Category One: Understanding and Validating Resource Requirement

There are tasks to help you understand and validate a resource requirement within an EOC.

- Communicate with requestor as necessary to understand mission and resource requirements.
- Apply awareness of the situation to initially validate resource request and anticipate unrequested resource needs.



Visual 12: Communicating with a Requestor

The first step in understanding the resource request should start with communication with the requestor.

As an EOC leader with a resource support role, you should leverage the **CSALTT** concept discussed earlier to help you:

- Understand the capability/resource
- Validate the capability/resource

RESOURCE ORDER				Initial Entry Time		2. INCIDENT/PROJECT NAME		3. INCIDENT/PROJECT ORDER NUMBER		4. OFFICE REFERENCE NUMBER							
5. DESCRIPTIVE LOCATION/RESPONSE AREA				6. SEC TWIN ENG Base MEM		8. INCIDENT BASE/PHONE NUMBER				9. JURISDICTION/AGENCY							
7. MAP REFERENCE				10. ORDERING OFFICE													
11. AIRCRAFT INFORMATION				LAT		LONG											
BEARING	DISTANCE	BASE OR OMNI	AIR CONTACT	FREQUENCY	GROUND CONTACT	FREQUENCY	RELOAD BASE	OTHER AIRCRAFT/HAZARDS									
12. Request Number				Original Date/Time	From	To	12. REQUEST REQUESTED	Handled Date/Time	Seller To	From	Time Agency ID	RESOURCE ASSIGNED	ETO	ETA	RELEASED	Time ETA	
13. ORDER RELAYED				Rel. No.	Date	Time	To	From	ORDER RELAYED				Rel. No.	Date	Time	To	From
ACTION TAKEN				ACTION TAKEN				ACTION TAKEN				ACTION TAKEN					

ICS 200-1 (7/2017) NFES 1470



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The first step in understanding the resource request should start with communication with the requestor. As an EOC leader with a resource support role, you should leverage the CSALTT example we discussed earlier to help you understand and validate the capability/resource.

Visual 13: Resource Requirement Tools

There are tools that can be used to help validate resources. The CSALTT concept is a tool that's used for:

- Ordering provisions
- Resources
- Teams



Visual 14: CSALTT Validation

C – capability being requested
S – size
A – amount being requested
L – location the mission/resources are being deployed
T – FEMA Type
T – time the supplies/resources are needed



Visual 15: Understanding the Mission and Resource

To understand a resource requirement, you should focus on the capability, first.

This is important because, a requestor may think that they need a specific resource, however as an EOC resources leader, you can identify other options that can fill the capability without delays.



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By utilizing the CSALTT concept it can help us to understand the capability as well as assist the requestor with requesting the right type of resources to fill the capability. Let's further examine the CSALTT concept.

Visual 16: Requesting Resources Based on the CSALTT Process

- What is the capability needed/problem to be solved?
- In order to fully fill the need, you should understand the size of the resource.
- How many of the resources are needed to fill the request?
- How many locations should accommodate this resource?
- You should clearly understand the mission/resources that are being deployed and to what locations.
- Where will the request be deployed to or what location?
- What type of FEMA resource request?
- How long will the resource be needed for this location?

Here are some questions and key points to consider when understanding a resource requirement and completing a resource request:



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- Capability – your goal is to understand the need first and not necessarily the resource. What is the capability needed/problem to be solved?
- Size – in order to fully fill the need, you should understand the size of the resource.
- Amount – provides how many of the resources are needed to fill the request. How many locations should accommodate this resource? How many resources are needed?
- Location – by understanding the location, it helps to understand the size and amount. You should clearly understand the mission/resources that are being deployed and to what locations. This helps to ensure that the resource requirement will be filled accurately and meet the full needs of the actual capability.
- Type – Why type of FEMA resource request?
- Time – having a clear understanding of the amount of time needed to fill a capability is an important step. This allows you to know how long a resource will be needed at a specific location(s). This knowledge ensures that the capability can be resourced for the time needed. How long will this resource be needed for this location?

Visual 17: Class Discussion: CSALTT and Resource Requirement

The CSALTT concept is important to utilize because it helps you understand the capability and validate the resource request.

What supplemental documents would you use with the CSALTT concept to guide the requestor in submitting a resource request?



Question:

What supplemental documents would you use with the CSALTT concept to guide the requestor in submitting a resource request?



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Visual 18: Defining Resource Typing

Resource typing is defining and categorizing, by capability, the resources requested, deployed, and used in incidents.



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Resource typing is defining and categorizing:

- Based on the capability
- Resources requested
- Deployed resources
- Used in incidents

Visual 19: Resource Typing

Resource typing definitions establish a common language and defines a resource's minimum capabilities for:

- Equipment
- Teams
- Units



Question:

Who has experience with handling resources in an EOC?

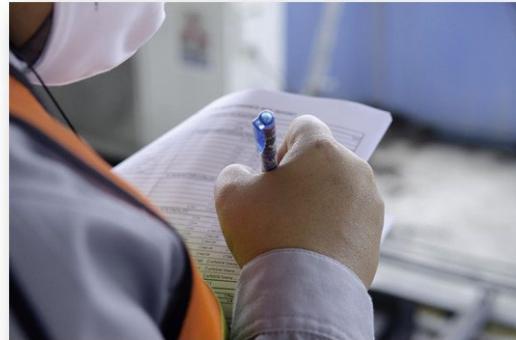


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Visual 20: Resources Requirements Tools and Resources

Here are some tools that you can use to help you describe resource requirements:

- Resource Typing Library
- Previous examples that emphasize plain language
- EOC Resource Requirements Checklist
- Resource Point of Contact
- Operating environment



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The resource request should be written based on the capability and requirement to ensure you receive a resource that resolves the need versus an actual name of a resource.

Visual 21: Awareness and Validation of a Resource

The last step under Task Category One – Understand and Validate the Resource Requirement, is to apply awareness of the situation to initially validate a resource request and anticipate an unrequested resource need.



Visual 22: Describing Resource Requirements

Describe	Describe the resource request in a way that alleviates confusion.
Scope	Scope the request in terms of capability rather than in terms of specific resources.
Incorporate	Incorporate national resource typing definitions, as available.
Demonstrate	Demonstrate awareness of national standards and common terminology for personnel and resources.
Verify	Verify request details and address missing information.

Describe the resource request in a way that:

- Scope the request in terms of capability rather than in terms of specific resources
- Incorporate national resource typing definitions, as available
- Demonstrate awareness of national standards and common terminology for personnel and resources
- Verify request details and address missing information

Question:

How would you go about assisting the requestor to describe a resource requirement using this list?



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Visual 23: Task Category Two: Communicating in Plain Language

Task category two is to:

- Communicate requirement in plain language
- Use national standards and common terminology

EXAMPLE

Protect your community from natural disasters!

- Build safely in the flood zone, or remove buildings altogether
- Engineer buildings and infrastructure to withstand earthquakes
- Create and enforce effective building codes



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Question:

Who has had to use communication and plain language requirements for writing documents within their EOC?

What steps did you take or what resources did you utilize to help ensure that you were using plain language requirements?

Visual 24: Describing Resource Requirements Plain Language

The use of plain language or common terminology allow the ability to communicate clearly with each other and effectively coordinate response activities, no matter what the size, scope or complexity of the incident.

This includes:

- Area commanders
- State and local EOC personnel
- Federal operational coordinators
- Emergency responders



Visual 25: NIMS Common Terminology and Plain Language Requirements

NIMS states that all communications between organizational elements during an incident, whether oral or written, should be in plain language; this ensures that information dissemination is:

- Timely
- Clear
- Acknowledged
- Understood



NIMS states, —All communications between organizational elements during an incident, whether oral or written, should be in plain language; this ensures that information dissemination is:

- Timely
- Clear
- Acknowledged
- Understood



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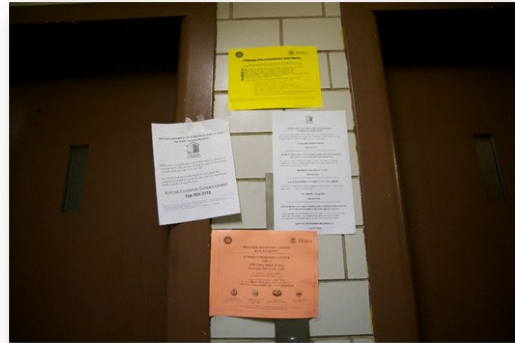
NIMS provides the following definitions:

- **Common Terminology:** Normally used words and phrases—avoiding the use of different words/phrases for same concepts—to ensure consistency and to allow diverse incident management and support organizations to work together across a wide variety of incident management functions and hazard scenarios.
- **Plain Language:** Communication that can be understood by the intended audience and meets the purpose of the communicator. For the purpose of the National Incident Management System, plain language is designed to eliminate or limit the use of codes and acronyms, as appropriate, during incident response involving more than a single agency.

Visual 26: NIMS Guidelines for Common Terminology

Common terminology and Plain language should follow these guidelines:

- Codes should not be used.
- All communications should be confined to essential messages.
- The use of acronyms should be avoided during incidents requiring the participation of multiple agencies or organizations.



Visual 27: Plain Language Example

Before

“This regulation governs disaster assistance that:

- Consists of services to prevent hardship caused by fire, flood, or acts of nature
- Furnished by a provider other than FEMA or the Red Cross.”

After

“This regulation governs disaster assistance for services to prevent hardship caused by fire, flood, or acts of nature that are not provided by FEMA or the Red Cross.”

Visual 28: Class Discussion: Develop a Resource Management Process

Discuss with the class the following:

1. Why is common terminology and plain language important when processing these requests?
2. What primary tasks would be needed to develop a resource management process to fulfill the validated requests?
3. What forms, timeline, and personnel should be involved in the development of the process?



Activity:

With the class, complete the following action items:

- Why is common terminology and plain language important when processing these requests?
- What primary tasks would be needed to develop a resource management process to fulfill the validated requests?
- What forms, timeline, and personnel should be involved in the development of the process?



Student
Manual

Visual 29: Unrequested and Supporting Resources

An unrequested resource is a resource that arrives at the incident without being formally requested.

Examples:

- Responders may come to an incident without being requested
- Requestor may submit a request without including all needed information to support the resource requested



Visual 30: Unrequested Resource Strategies

Strategies for using self-dispatched resources include:

- Information about the resource should be shared with the EOC leaders and EOC staff. This includes the EOC finance staff.
- Nongovernmental and private-sector resources should be inspected, and formal agreements completed as soon as possible.

The presence and status of public-sector resources on the incident should be reported to their home agency.



DVIDS image by Steven Shepard

Visual 31: Breakout Group Exercise One: Guiding Requestor through a Resource Request

With your group, complete the following action items:

1. Explain the differences between resource typing and resource capability and identify the advantages and disadvantages of each one.
2. What tools, references, and forms would the EOC Director make sure to have available for the person handling the resource position for incoming requests for the first time?
3. How would the EOC Director expect the Resource person to use the tools above to validate any received requests?
4. What resources have been requested by 11:00am?
5. What can the EOC anticipate will be requested?
6. How would you validate the capabilities of the volunteers? Once validated, what would you do with the volunteers?

Activity:

GROUP EXERCISE SCENARIO:



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An explosion occurs at 9:00am, at a chemical plant two miles from a busy downtown shopping area. Local news media are reporting that an undetermined number of the chemical company's employees are injured or killed, and officials are trying to determine to what extent deadly toxins have been released into the air. No one is sure what caused the blast. All available fire units have arrived at the explosion site and are engaged in fire suppression.

By 9:30am, the EOC has been called to full activation but is impacted by 50% of the staff being in quarantine due to the pandemic. This has resulted in several staff members taking on unfamiliar roles. One of those roles is as lead for ordering and acquiring resources to fulfill any requests received.

The EOC Director is aware of the situation and is ready to assist the staff where/when needed.

By 10:30am, both the local Civil Air Patrol squadron and Team Rubicon group have offered assistance and are awaiting a response from the EOC. Over the past three days, the weather forecast had been predicting the arrival of strong winds caused by a storm front moving through the area. An hour after the explosion the predicted winds arrived and the smoke from the explosion and fire are approaching the shopping area. The IC has requested support from the EOC to manage public messaging and issuing a shelter-in-place message to the community. Ambulances have been dispatched to the shopping area in response to calls for shoppers experiencing breathing difficulties. Fire department EMS crews are handling other 911 emergency calls. People have been rushed to the area hospitals complaining of breathing difficulties; and public health officials are encouraging people all over the city to stay indoors as a precaution. The local elementary school is currently upwind of the explosion, but it will soon be time for the afternoon kindergarten students to arrive and the principal needs to decide about what actions should be taken to protect the students.



Student
Manual,
continued

The mayor has received a call from the school Superintendent requesting assistance with measuring the air quality in the elementary school. At 10:45am The Mayor has passed the request on to the EOC. Parents are calling 911 for updates on the conditions at the school. The 911 Supervisor is requesting the EOC set up a call center to manage the community calls. People are speculating on social media that terrorists caused the explosion. Traffic in the downtown shopping area is becoming a problem. People are trying to leave the area, but the congestion caused by existing road construction and two vehicle accidents have created large traffic jams. Several law enforcement units have been directed to the explosion site, thus creating a need for additional units from neighboring communities for traffic assistance. By 11:00am, the immediate danger has passed, and authorities have declared the explosion was caused by an accident. The resulting clean-up has stretched the capability of the public works department and created a need for expertise in dealing with hazardous material remnants. In addition, the explosion caused damage to the waterlines in the surrounding four block area. The extent of damage is unknown, currently. At 4:00pm, a new IC arrives to assume command of the scene and is requesting an update on resource requests.

With your group, complete the following action items:

1. Explain the differences between resource typing and resource capability and identify the advantages and disadvantages of each one.
2. What tools, references, and forms would the EOC Director make sure to have available for the person handling the resource position for incoming requests for the first time?

3. How would the EOC Director expect the Resource person to use the tools above to validate any received requests?

4. What resources have been requested by 11:00am?



Student
Manual,
continued

5. What can the EOC anticipate will be requested?

6. How would you validate the capabilities of the volunteers who have offered assistance? Once validated, what would you do with the volunteers?

Visual 32: Unit Four Summary

Congratulations! We have reviewed the following:

- Resource requirement as it relates to an EOC
- Resource requirement analysis and validation
- Unrequested resource based on the capability
- Resource requirement using FEMA national standards and common terminology
- Resource management and coordination



Unit 5: Resource Sourcing

Visual 1: Unit 5: Resource Sourcing

K2306 EOC Resources Support Skillset Course Unit 5: Resource Sourcing

Visual 2: Unit Five Objectives

After this Unit, you will be able:

- Choose a resource source based on the requirements for supporting, acquiring, and fulfilling the requests received.
- Identify resource constraints.
- Formulate a course of action to fulfill a resource request.

Visual 3: Class Discussion

Understanding resource sourcing is vital to providing resources during an incident or planned event.

What resources does your jurisdiction own that can be deployed at the beginning of an incident?



Question:

Understanding resource sourcing is vital to providing resources during an incident or planned event. What resources does your jurisdiction own that can be deployed at the beginning of an incident?

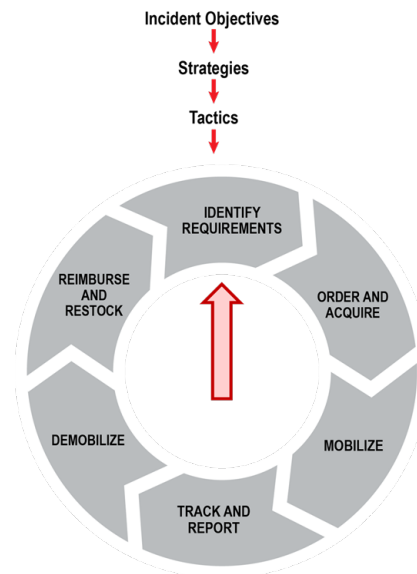


Student
Manual

Visual 4: Comprehensive Resource Management

The CRM cycle begins with these key items to help to identify requirements:

- Incident objectives
- Strategies
- Tactics



Everything with an incident that needs “stuff” starts with understanding Comprehensive Resource Management, or CRM was introduced in previous courses. Once the incident objectives, strategies, and tactics are done, resource requests may come in to the EOC to support the planned tactics.



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- The information from the objectives, strategies, and tactics enables the EOC to identify and clarify the requirements needed to fulfill the resource requests.
- Using pre-planning and baseline knowledge of immediately available resources, the EOC can identify sources for the resources being requested.
- Several options available to order and acquire resources include mutual aid agreement activations, contract activations, or partnering with community agencies.
- Finding sources and getting the resources to the incident requires the EOC to track these incoming assets.

Visual 5: What is a Resource?

Resources are defined as:

- People
- Equipment
- Supplies
- Facilities
- Vehicles
- Services



Resources are defined as:

- People
- Equipment (generators, computers, etc.)
- Supplies (consumables such as fuel)
- Facilities
- Vehicles
- Services (cleaning, childcare, security, and transportation)



Student
Manual

Money is not considered a resource. Resource management can't request money or source out for it.

How you **acquire** resources during a crisis or event are through sources typically through 3rd party vendors, mutual aid partners, and agency partners. Large-scale disasters often disrupt normal supply chains, triggering the need for temporary relief supply chains that address critical emergency supplies such as food, water, and fuel. This temporary distribution management system is managed by state, local, tribal, and territorial (SLTT) agencies or voluntary, faith-based, or community-based organizations.

Visual 6: What Do You Think?

In your jurisdiction, what kind of resource is usually in great demand?

Are there any ways to alleviate the conflict that can arise with those most requested resources?

Question:

1. In your jurisdiction, what kind of resource is usually in great demand?



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2. Are there any ways to alleviate the conflict that can arise with those most requested resources?

Visual 7: Where are Resources Found?

Resource sources
can be:

- People
- Equipment
- Supplies
- Facilities
- Vehicles
- Services



Remember that establishing these agreements will involve several components of the organization including legal and financial approvals.

Resource sources can be:



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- Contractors (applies to the private sector, may have pre-established agreements with the vendors)
- Mutual aid partners (EMAC and local mutual aid agreements)
- Vendors
- Partnerships
- Government agencies (State, Federal, or local)
- Private sector and corporate
- NGO

Visual 8: Types of Sources

- **Mutual Aid Agreements and Compacts:** Establishes the legal basis for two or more entities to share resources.
- **Existing Internal Capability and Supply Levels:** A standing inventory of critical emergency supplies can be drawn upon in response to an incident.
- **Vendor-Managed Inventory:** Provides certain information to a supplier of that product (vendor), and the supplier takes full responsibility for maintaining an agreed-upon inventory of the material.
- **Partnership:** Requires understanding of steady-state operations and available capabilities.

Questions

1. Which of these sources is the most common in your EOC organization?



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2. If your jurisdiction has a standing inventory of supplies, who has the responsibility to maintain it?

Visual 9: Mutual Aid Process

- A request for resources is received from the requesting jurisdiction.
- The request is evaluated by the providing jurisdiction to determine if they can accommodate a temporary loss of the resource.
- If the providing jurisdiction can accommodate the request, they deploy the resource to the requesting jurisdiction.
- Most agreements include an initial time period with no cost incurred. If that time is exceeded, the pre-determined costs and requirements are in place.



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Mutual Aid Process:

- A request for resources is received from requesting jurisdiction.
- The request is evaluated by the providing jurisdiction to determine if they can accommodate a temporary loss of the resource.
- If the providing jurisdiction can accommodate the request, they deploy the resource to the requesting jurisdiction.

Visual 10: Partnership

A partnership requires an understanding of steady-state operations and available capabilities.

What kind of partnerships are beneficial to obtain and sustain?



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A partnership requires an understanding of steady-state operations and available capabilities. For example, consider identifying SLTT institutions that order and buy meals and water on a regular basis, such as schools and universities, correctional facilities, and other community facilities.

Visual 11: Vendor-Managed Inventory

Vendor-Managed Inventory (VMI) is a family of business models in which:

- Buyer of a product provides certain information to a supplier of that product (vendor).
- Supplier takes full responsibility for maintaining an agreed-upon inventory of the material.

What organization in your jurisdiction would be a possible source for a VMI?



Vendor-Managed Inventory (VMI) is a family of business models in which:

- Buyer of a product provides certain information to a supplier of that product (vendor).
- Supplier takes full responsibility for maintaining an agreed-upon inventory of the material.

Question

What organization in your jurisdiction would be a possible source for a VMI?



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Visual 12: Sourcing through Contracts

Contracts can address the need for the following resources and capabilities:

- Life-sustaining commodities (water, meals, cots, blankets, tarps)
- Critical emergency supplies/ equipment (generators, fuel, sandbags, pumps)
- Transportation or other essential services
- Third-party logistics (warehouse management, inventory tracking)



DVIDS image by Robert Haynes

Developed by Finance, Administration, & Legal departments.

Executed by the Resource function when needed.



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Contracts can address the need for the following resources and capabilities:

- Life-sustaining commodities (e.g., water, meals, cots, blankets, tarps)
- Critical emergency supplies/equipment (e.g., generators, fuel, sandbags, pumps)
- Transportation (e.g., air, sea, ground, multimodal)
- Third-party logistics (e.g., warehouse management, inventory tracking)

Keep in Mind: EOCs do not handle contract work so much – they implement and execute contracts, but they don't write them.

Developing contracts is typically handled by the finance and administrative departments. Resource section/department is used to implement and execute these contracts.

Visual 13: Source Awareness

Before developing an acquisition plan, answer these questions:

- Do you understand the capabilities of requested resources?
- Do you have knowledge of existing supplies in storage?
- Have you activated any contacts with personnel from other organizations?
- Is there an existing process to facilitate acquisition and fulfillment?



Questions

1. Do you understand the capabilities of requested resources?



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2. Do you have knowledge of existing supplies in storage

3. Have you activated any contacts with personnel from other organizations?



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Manual,
continued

4. Is there an existing process to facilitate acquisition and fulfillment?

Visual 14: Resource Planning

Planning for resources relies on:

- Coordinating with resource acquisition personnel from other organizations
- Prioritizing the allocation of scarce resources.
- Identifying incident-specific fiscal and resource constraints
- Understanding the relevant threats and hazards as identified in your jurisdiction's THIRA or mitigation plan



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Sourcing resources relies on establishing organic capabilities and capacity to provide commodities and equipment to disaster survivors based on the pre-identified jurisdictional requirements.

Establishing multiple sourcing mechanisms mitigates supply chain risk. Thus, building existing internal capability and stocks is paramount to effective distribution management; for example, through developing standing, spot, or contingency contracts for resources, vendor-managed inventory (VMI), logistics services, and warehousing and coordinating with nonprofit and other government partners (e.g., Voluntary Organizations Active in Disaster [VOADs], the EMAC).

Resource: [CPG 201 THIRA and Stakeholder Preparedness Review \(SPR\) Guide. 2018 edition, 3rd edition.](#)

Visual 15: Coordinating with Resource Acquisition Personnel

Why is this important?

How should this be accomplished?

How can this skill be demonstrated in the EOC?



One of the main tasks in sourcing is coordinating with resource acquisition personnel from other organizations to identify potential resources and gain a better understanding of sourcing mechanisms.

- Be aware of this ahead of time: Create awareness that any jurisdiction that requests resources also assumes the financial responsibility for that resource unless there is another funding mechanism in place. For example, if the incident scales to a federal declaration, then certain costs may be reimbursable down the road.
- Some emergency funding may be dependent on elected officials' declarations of emergency (make sure to tell students the difference between emergency declarations and states of emergency).
- Cost sharing – federal laws dictate specific cost share requirements and waivers. Cost Share, also known as “non-Federal share,” or “match,” is the portion of the costs of a federally-assisted project or program not borne by the Federal Government.
- Use of volunteers – assist in the reduction of cost sharing



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Questions

1. Why is this important?

2. How should this be accomplished?



Student
Manual,
continued

3. How can this skill be demonstrated in the EOC?

Visual 16: Prioritizing Scarce Resources

Prioritizing is key in understanding how/when to acquire resources.

When prioritizing, you must factor in the following:

- **Duration** – How long will the resource be needed?
- **Timing/Urgency** – How fast is the resource needed?
- **Location** – How to get the resource to the specific location(s)?
- **Costs** – What are the associated cost factors?
- **Political issues** – How would politics impact resource management during an incident?



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The next task is to prioritize the allocation of scarce resources.

- Duration – How long will the resource be needed?
- Timing/Urgency – How fast is the resource needed?
- Location – How to get the resource to the specific location(s)?
- Costs – What are the associated cost factors?
- Political issues – How would politics impact resource management during an incident?

Visual 17: Poll: Priority in Sourcing Resources



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Question

Which order of priority in sourcing resources is a practice in your EOC?

- A. County, Local, State, Federal, Private industry
- B. Local, County, State, Federal, Private industry
- C. Private industry, Local, State, County, Federal
- D. Local, Private industry, County, State, Federal

Visual 18: Resource Constraints

Fiscal Constraints

- Financial responsibility
- Local regulations
- Cost sharing
- Use of volunteers



Resource Constraints

- High Demand Low Density (HDLD)
- Access to the region
- Ability to handle the logistics
- Timeliness
- Safety



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The next task is to demonstrate awareness of incident-specific constraints:

- Fiscal
- Resource

Visual 19: Implement a Resource Management Process

Resource management describes standard mechanisms to:

- Provides a systematic approach to managing resources, including personnel, equipment, supplies, teams, and facilities, both before and during incidents.
- Allows organizations to more effectively share resources when needed.
- Identifies the steps to evaluate the effectiveness of the courses of action for resource fulfillment.



Visual 20: Course of Action Considerations for Fulfilling a Resource Request

Incident	What are the needs and priorities?
Logistical Factors	What are the factors around transport, security, storage, and support requirements?
Legal	What are the legal considerations?
Financial	What are the costs/budget for this resource?
Backfill	What are the backfill requirements?
Mutual Aid	What are Mutual Aid, private sector, and VOAD capabilities?



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Course of Action (COA) is an overall plan that describes the selected strategies and management actions intended to achieve Incident Objectives, comply with Incident Requirements, and are based on current and expected conditions. The COA should be aligned with direction provided in the incident objectives and strategies. The COA is a required part of a decision and must contain at least one documented action item. After selecting courses of action, resources are identified to accomplish each course of action. Once all the requirements are identified, matching available resources to requirements takes place. This step provides an opportunity to identify resource gaps or shortfalls that must be considered.

Develop courses of action for fulfilling resource requirements or requests, factoring in considerations such as:

- Incident needs and priorities
- Logistical factors, such as transport, security, storage, and support requirements
- Legal considerations
- Financial factors/costs
- Backfill requirements
- Mutual aid, private sector, and Voluntary Organizations Active in Disaster (VOAD) capabilities

Visual 21: Resource Management During an Incident

Local first responders will have a resource management process in place. However, the process should also be defined within the EOC.

There should be crucial documents in place to align to the fulfillment actions to the overall Resource Management Process, such as:

- Incident Action Plan
- EOC Action Plan
- SOPs
- Checklists
- Tracking forms
- Communication logs
- Request forms



Visual 22: ICS 213RR – Resource Request

RESOURCE REQUEST MESSAGE (ICS 213 RR)							
1. Incident Name:			2. Date/Time		3. Resource Request Number:		
Requestor	4. Order (Use additional forms when requesting different resource sources of supply.):						
	Qty.	Kind	Type	Detailed Item Description: (Vital characteristics, brand, specs, experience, size, etc.)	Arrival Date and Time		Cost
					Requested	Estimated	
5. Requested Delivery/Reporting Location:							
6. Suitable Substitutes and/or Suggested Sources:							
7. Requested by Name/Position:			8. Priority: ☐ Urgent ☐ Routine ☐ Low		9. Section Chief Approval:		
Logistics	10. Logistics Order Number:				11. Supplier Phone/Fax/Email:		
	12. Name of Supplier/POC:						
	13. Notes:						
	14. Approval Signature of Auth Logistics Rep:				15. Date/Time:		
Finance	16. Order placed by (check box): ☐ SPUL ☐ PROC						
	17. Reply/Comments from Finance:						
	18. Finance Section Signature:				19. Date/Time:		
ICS 213 RR, Page 1							



Link to [all PDF fillable forms](#)

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Visual 23: ICS 213RR Block Instructions

Which of the lines of information would be of primary importance to the EOC in fulfilling a request?

Block Number	Block Title	Instructions
1	Incident Name	Enter the name assigned to the incident
2	Date/Time	Self explanatory
3	Resource Request #	Self explanatory
4	Order	Specify quantity, item description, cost. Complete resource status section after resource is received.
5	Resource Status	Enter applicable resource status fields
6	Requested Delivery/Reporting Location	Enter location requested resource delivery/reporting location
7	Suitable Substitutes and/or Suggested Sources	Enter possible substitute items if exacted requested resource is not available. Provide supplier information if known.
8	Requested by Name/Position:	Requestor's name and position
9	Priority	Select Urgent, Routine, or Low priority
10	Section Chief Approval	Obtain appropriate Section Chief signature for request
11	Logistics Order Number	Enter Logistics Order Number if applicable
12	Supplier Phone/Fax/Email	Enter resource Supplier's Phone/Fax/Email
13	Name of Supplier/POC	Enter name of resource supplier/POC
14	Notes	Any relevant notes regarding the request
15	Approval Signature of Authorized Logistics Rep	Enter approval signature of an authorized Logistics Section representative
16	Date/Time	Self explanatory
17	Order placed by	Enter name of individual who places order for requested resource(s)
18	Reply/Comments from Finance	Any relevant notes regarding the request
19	Finance Section Signature	Enter approval signature of an authorized Finance/Admin Section representative
20	Date/Time	Self explanatory

Question

What information would be the MOST important to fulfill a resource request?



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Visual 24: Personnel and Resource Fulfillment

Notify appropriate personnel for resource fulfillment and information based on selected course of action:

- Close loop for requestor
- Report resource request status



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Closing the loop in the process is as important as finding the resource initially. Within the EOC resource personnel will be personnel responsible for notifying the personnel on the incident staff of the status of their requests. This step assists the EOC in tracking requests, following the progress of the incident, and supporting additional requests by knowing where resources are and who needs them next.

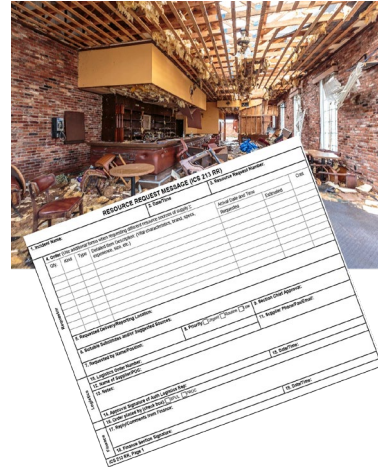
Notify appropriate personnel for resource fulfillment and information based on selected course of action:

- Close loop for requestor
- Report resource request status

Visual 25: Breakout Group Exercise: Considerations in Resource Fulfillment

In the upcoming incident, several issues have happened and will require coordination with the EOC to meet the needs of the responders.

Based on the scenario, with your group, discuss the questions and develop a course of action to fulfill the requests received.



Activity:

Based on the scenario, with your group, complete the following action items for each of the requests.



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- Identify possible sources for the resource requests received by the EOC. Using the attached 213RR, what gaps in information need to be filled before sourcing the requests. Do each request individually. <https://training.fema.gov/icsresource/icsforms.aspx>
- If you are unable to fill the request information gaps, how would you move forward in fulfilling the requests?
- Are there any logistical support supplies/equipment that will need to accompany the requested supplies? What are they? What sources can supply them?
- Identify three external sources for resources. What are the advantages and disadvantages of each?

Visual 26: Unit Five Summary

Congratulations! We have reviewed the following:

- Supply sources for a resource request
- Resource constraints
- Course of action to fulfill a resource request



Unit 6: Resource Ordering and Acquiring

Visual 1: Unit 6: Resource Ordering and Acquiring

K2306
EOC Resources Support
Skillset Course
Unit 6: Resource Ordering and
Acquiring

Visual 2: Unit Six Objectives

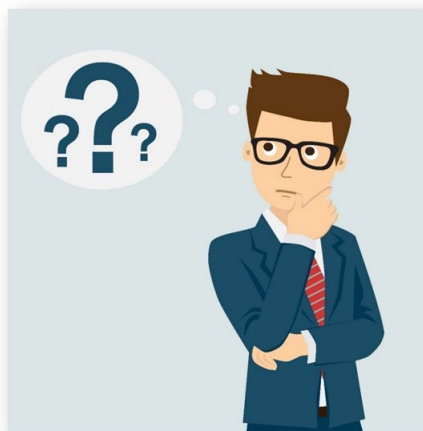
At the conclusion of this unit, you will be able to:

- Explain how to order and acquire a resource based on a request.
- Analyze a resource request based on the need.
- Examine resource reimbursement requirements.

Visual 3: Class Discussion

Resource ordering and acquiring should answer some key questions.

What do you think those questions are?



Questions:

Resource ordering and acquiring should answer some key questions.

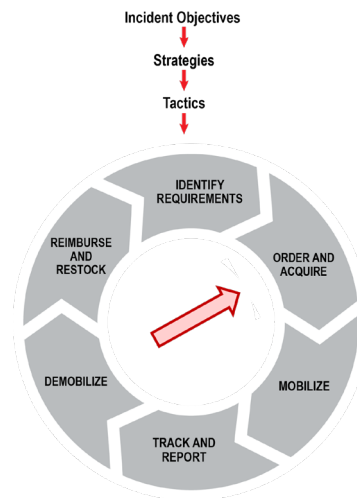


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What do you think those questions are?

Visual 4: Comprehensive Resource Management

Upon completion of identifying requirements within the CRM cycle, move to “Order and Acquire.”



Once the incident objectives, strategies, and tactics are done, resource requests may come in to the EOC to support the tactics (depending on what the resource management strategy is).



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- Using a lot of pre-planning and baseline knowledge of immediately available resources, we can **identify the requirements** to fill the mission
- We have a host of options available to **order and acquire** resources, and the EOC can help track these incoming assets. This might include mutual aid agreement activations, contract activations, or partnering with community agencies.

Visual 5: Resource Ordering and Acquiring

Resource ordering and acquiring requires EOC personnel to conduct initial and ongoing assessments of resource requirements.

Based on the resource assessments, EOC personnel can either activate or request those resources.



Visual 6: EOC Resources

The EOC personnel can order additional resources by:

- Executing contracts
- Implementing mutual aid agreements
- Requesting assistance from another level of government



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The EOC and incident personnel can order additional resources by:

- Executing contracts
- Implementing mutual aid agreements
- Requesting assistance from another level of government (for example, a local government to a state, or a state to the Federal Government)

Visual 7: Qualifying and Credentialing Personnel

The Authority Having Jurisdiction (AHJ) has the authority for credentialing within its organization or jurisdiction.

The establishment of national standards provide common, compatible structures for the qualification and certification of emergency management personnel. EOCs do not certify personnel.



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EOCs do not certify personnel. However, it is important to have staff already in place and ready to onboard before an incident occurs. Therefore, having situational awareness of the qualifying, certifying, and credentialing process is important to know and understand as an EOC leader in a resources management position.

Visual 8: Qualifying and Credentialing Personnel, cont'd

How does your EOC get qualified and certified personnel?

How does the mission scope effect EOC personnel selection?



Visual 9: Planning for Resources

EOCs work with jurisdictions and organizations before incidents occur to develop plans for resources. This includes:

- Identifying
- Managing
- Estimating
- Allocating
- Ordering
- Deploying
- Demobilizing



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To plan for resources, jurisdictions and organizations:

- Estimate their current capabilities
- Assess their resource management gaps
- Establish resource management planning priorities
- Utilize mutual aid agreements to address those gaps

Visual 10: Resourcing Based on Capabilities

EOCs find ways to fill the gaps during a large-scale incident, based on:

- Current capabilities
- Resource demands



Visual 11: Questions to Consider When Resource Planning

What do we need to prepare for?

What resources do we have that allow us to achieve our targets?

What resources can we obtain through mutual aid to be prepared to meet our targets?



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Here are some questions to consider when you are resource planning based on your EOC:

- What do we need to prepare for?
- What resources do we have that allow us to achieve our targets?
- What resources can we obtain through mutual aid to be prepared to meet our targets?

Visual 12: Acquiring, Storing, and Inventorying Resources

In addition to stockpiling EOC resources for incidents. You are required to:

- Acquire resources
- Store resources
- Inventory resources

This is important for day-to-day operations.



Visual 13: Resource Collaboration

Jurisdictions coordinate with the EOCs to:

- Track and inventory broad operational capabilities and logistical requirements, such as storage.
- Acquire resources by making purchases, receiving donations, or hiring personnel.



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As a leader in an EOC/resource management role, you are not alone with this task! This is a collaborative process in which departments, agencies and organizations each maintain their own resources and jurisdictions/organizations coordinate with them to track and inventory broad operational capabilities and logistical requirements, such as storage.

Visual 14: Collaboration

- Acquisition processes and protocols vary from jurisdiction to jurisdiction.
- Once inventory resources are on hand, the jurisdiction should properly store them for future use.
- Storage processes and procedures also vary from jurisdiction to jurisdiction.



The key takeaways are:



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- Knowing your jurisdiction procedures before an incident occurs
- Have pre-established partnerships and relationships in place
- Having knowledge even at a basic level of acquisition protocols based on your EOCs jurisdiction
- Inventorying your EOC for resources and stockpiling
- Creating a Need-to-Know list or Checklist of all questions to consider when ordering and acquiring resources and resource management
- Situational awareness of the varying processes and steps that align to resource management

Visual 15: EOC Resource Inventory

It is important for your EOC to maintain a process for inventory and tracking of all resources. Effective resource management involves:

- Establishing a resource inventory
- Keeping the information current and accurate
- Checklists to ensure procedures are followed



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EOC resource managers use Information Technology (IT)-based inventory systems to:

- Document and track resources
- Accurate inventories enable organizations not only to resource incidents promptly but to support day-to-day resource management activities

Visual 16: Documenting Status of Resource Requests

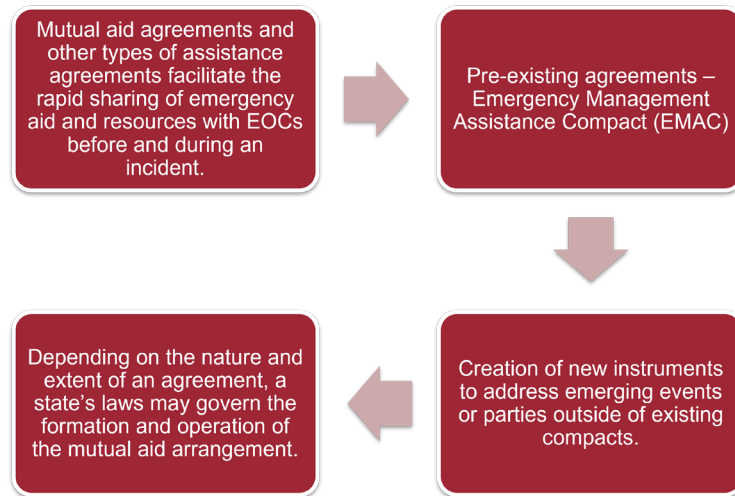
Questions concerning the status of a request or resources should be readily identified.

It is important to document the status of a resource request throughout its lifecycle.

Tools: WebEOC, Veoci, Excel, eTeam, and Google Sheets



Visual 17: Mutual Aid Agreement and Compacts



Visual 18: Local Automatic Mutual Aid

Local automatic mutual aid agreements allow automatic dispatch of requested resources without incident-specific approvals or consideration of entity boundaries. Used under conditions when time is a factor to:

- Save lives
- Prevent human suffering
- Mitigate property damage following an incident



Examples of local automatic mutual aid include:



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- Local first responders may routinely provide emergency services to a nearby Federal facility that does not have organic capabilities. Or this agreement may also include a Federal entity providing automatic response.
- A fire department from a military installation may respond to an automobile accident outside of its gate because it is the closest appropriate emergency resource, even though the area where the accident occurred is outside the fire department's area of responsibility.

Visual 19: Local Mutual Aid

Local mutual aid agreements between neighboring jurisdictions or organizations involve a formal request for assistance. EOCs have access to significant additional resources by utilizing mutual aid.

- Private sector/corporate
- NGO
- Community/faith-based organizations



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Examples of local mutual aid include:

- Utility companies, whether privately or publicly owned, typically enter into mutual aid agreements with local communities.
- While “utilities” can refer to a wide range of services provided to the public, common utility mutual aid agreements provide for electrical, water, wastewater, and other services, such as cybersecurity assistance. Emergency aid and assistance may be provided in the form of personnel, equipment, materials, and other associated services, as necessary.

Visual 20: Regional, Intrastate, or Statewide Mutual Aid

Statewide and intrastate mutual aid agreements are often coordinated through the state and incorporate both:

- State
- Local
- NGO

This approach can help reduce the number of local and jurisdiction-to-jurisdiction mutual aid agreements.



Examples of Statewide and intrastate include:

- The International Association of Fire Chiefs (IAFC) developed a National Fire Service Intrastate Mutual Aid System (IMAS) that ties local fire districts and departments into statewide mutual aid networks. IAFC uses the Mutual Aid Net tool to manage and dispatch all-hazard resources, individually or through mission-ready packages (MRP), in support of IMAS.
- The Mutual Aid Box Alarm System (MABAS) is a structured, planned mutual aid system for deploying fire, rescue, and emergency medical services personnel in a multijurisdictional and/or multi-agency response within a state. Illinois, Wisconsin, Indiana, Michigan, and parts of Missouri and Iowa use MABAS. MABAS connects fire, emergency management services (EMS), and special operations teams in hazardous materials, technical rescue, subsurface ice/water rescue, fire investigations, incident management, urban search and rescue, and station backfill coverage with standby firefighting and EMS resources through mutual aid requests.



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Visual 21: Interstate Mutual Aid – After Declaration

Interstate mutual aid can be established through various types of vehicles such as:

- Interstate compacts and agreements
- Federal agreements
- Sub-geographic plans



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An example of an interstate mutual aid compact is the Emergency Management Assistance Compact (EMAC), which is administered by the National Emergency Management Association.

Visual 22: Interstate Mutual Aid – Prior to or Without a Declaration

Prior to a declaration, the implementation of Interstate Mutual Aid occurs. Examples include:

- States
- Tribes
- Territories prior to a state or tribal emergency declaration

Jurisdictions need separate interstate agreements for such incidents or planned events. Some examples are:

- States Mid-America Mutual Aid Consortium
- Interstate Compact for Mutual Military Aid in an Emergency
- Interstate Earthquake Emergency Compact
- United South and Eastern Tribes, Inc. Tribal Emergency Mutual Aid Compact



Interstate Mutual Aid – Prior to or Without a Declaration Examples include:



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- The Mid-America Mutual Aid Consortium supports interstate mutual aid for emergency situations that do not result in a state or local declaration of emergency or disaster. The consortium helps parties recognize out-of-state professional licenses, certifications, or other permits when the state, or a county, city, village, township, special district, or other political subdivision or unit of local government, requests mutual aid from jurisdictions outside of their state. The consortium also provides certain persons with immunity from civil actions when acting pursuant to mutual aid agreements and maintains employee benefits and protections. Authority to participate is provided by inter-local agreements condoned through each participating state's statutory authorities.
- The United South and Eastern Tribes, Inc. (USET) Tribal Emergency Mutual Aid Compact (TEMAC) is the first emergency mutual aid agreement expressly for tribes in the United States. Developed in 2008, TEMAC provides mutual aid among USET member tribes within the context of tribal self-determination and self-governance. USET member tribes developed TEMAC for implementation by member tribes, but other tribes are free to model it.

Visual 23: Activity 6.1 Breakout Group Exercise: Resource Requests

Review the scenario from the perspective of the local EOC, develop responses, and identify the required documentation for ordering and acquiring resources.

1. What piece of the Resource Management process will ensure your ability to brief the Mayor's office accurately?
2. Based on the information you have gathered from the jurisdictions, what resources may be anticipated to be requested?
3. What logistical issues will need to be addressed in fulfilling the anticipated resource requests?
4. Why would resource typing be important when fulfilling these requests?
5. The EOC receives a request for an air asset. Will you need a fixed wing, helicopter, or UAV to fulfill the request? How large of an area will be included? Will you need photos or video? How long will the resource be needed? When will it be needed? Are there any specific logistical needs to be addressed?
6. What documentation will be needed to ensure the reimbursement requirements are met?

Activity

Review the scenario, develop responses, and complete the required documentation for ordering and acquiring resources.

1. What piece of the Resource Management process will ensure your ability to brief the Governor's office accurately?



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2. Based on the information you have gathered from the jurisdictions, what resources may be requested?

3. What logistical issues will need to be addressed in fulfilling the anticipated resource requests?

4. Why would resource typing be important when fulfilling these requests?



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5. Complete a 213RR to request an aerial resource to complete the survey. Will you need a fixed wing, helicopter, or UAV to fulfill the request? How large of an area will be included? Will you need photos or video? How long will the resource be needed? When will it be needed? Are there any specific logistical needs to be addressed?

6. What documentation will be needed to ensure the reimbursement requirements are met?

Visual 24: Poll: Ordering and Acquiring Resource Tasks



Visual 25: Order and Acquire Resources Associated Tasks

There are multiple associated tasks aligned to order and request resources:

- Demonstrate understanding of various resource ordering/requesting procedures and requirements.
- Ensure that documentation aligns with reimbursement requirements: Document necessary approvals, preapproved vendors, and on-call contracts.
- Ensure that requests address the resources' logistical needs.
- Identify appropriate sources.
- Transmit vertical resource requests, such as from local to state or from state to Federal.
- Update status of resource requests.



Visual 26: EOC Structures and Resources Reminder

What are three common ways of organizing EOC teams?



Visual 27: Incident Command Structure and Resource Management

Uses

- Uses familiar structure
- Mirrors organization of on-scene personnel
- Avoids additional EOC training requirements
- Supports situations when EOC staff may provide tactical direction

Resource Management

- May adapt resource management processes
- EOC defines coordination and tracking of resource ordering functions
- Logistics focus may be on advance resource ordering
- Operations may order departmental resources
- Operations may track incident resources

Question:

What are a few advantages and disadvantages of this structure?



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Visual 28: Uses of ISM Structure and Resource Management

Uses	Resource Management
• Focus on support functions • Situational Awareness Section – EOC Director • Resources Support Section: ○ Operations ○ Logistics ○ Comptroller/Purchasing • Streamlines resource sourcing, ordering, and tracking • Not organized for response and recovery efforts	• One-Stop - acquiring, deploying, and tracking • Resources Support Section: ○ Ordering ○ Tracking ○ Funding ○ Reimbursement • Organizational and Functional Representatives: ○ Resources ○ Expertise ○ Relationships

Question:

What are a few advantages and disadvantages of this structure?



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Visual 29: Departmental Structure and Resource Management

Uses

- Emergency Manager/EOC Director directly facilitates EOC
 - Planning
 - Reporting
 - Requests
 - Possibly EOC Logistics

Resource Management

- Have EOC roles and responsibilities
- Maintain normal authorities, responsibilities, and relationships
- Bring own resources, expertise, and relationships to EOC

Question:

Are there any questions or comments to add to the uses and resource management for Departmental structures?



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Visual 30: Sample Ordering Documents

[illegible]

WebEOC Order Entry

Visual 31: Resource Ordering Process

The Resource Order is used to document resource requests. Even though different formats may exist, every resource order should contain the following essential elements of information:

- Incident name.
- Order and/or request number (if known or assigned).
- Date and time of order.
- Quantity, kind, and type. Include special support needs as appropriate.
- Reporting location and contact (specific).
- Requested time of delivery (specific, not simply ASAP).
- Communications system to be used.
- Person/title placing request.
- Callback phone number for clarification or additional information.

Visual 32: Resource Request Actions

Resource order forms also have space to document action taken on a request, including, but not limited to:

- Contacts with sources or potential sources for the resource requests
- Source for the responding resource
- Identification of the responding resource (name, id number, transporting company etc.)
- Estimated time of arrival
- Estimated cost
- Changes to the order made by Command or the position placing the order

Such detailed information is often critical in tracking resource status through multiple staff changes and operational periods.

Visual 33: Single Point and Multi-Point Ordering Process

Incident resource orders may be placed with either:

- Single ordering point
- Multiple ordering points

DEPARTMENT OF HOMELAND SECURITY Emergency Management Agency RESOURCE REQUEST FORM (RRF)				O.M.S. No. 1600-0001 Expires May 31, 2017
PAPERWORK REDUCTION DISCLOSURE NOTICE				
Public reporting burden for this form is estimated to average 20 minutes per response, including the instructions for reviewing existing information, gathering and maintaining the data needed, and completing and reviewing the information collection. Send comments regarding this burden estimate or any aspect of this collection of information, including suggestions for reducing this burden, to Washington, DC 20543-0101, Paperwork Reduction Project (1600-0001). NOTE: Do not send your completed form to this address.				
1. Requester's Name (Please print)		2. Title		3. Phone No.
4. Requester's Organization		5. Fax No.		6. E-Mail Address
8. REQUESTING ASSISTANCE (To be completed by Requestor) 1. Description of Requested Assistance:				
2. Quantity 3. Priority 4. Leaving 5. Life Sustaining 6. Normal 7. Date and Time Needed				
8. Delivery Site Location 9. Site Point of Contact (POC) 7. 24 Hour Phone No. 8. Fax No.				
9. State Approval Official Signature 10. Date and Time				
II. SOURCING THE REQUEST - REVIEW/COORDINATION (Operations Section Only)				
1. ☐ OPS Review by _____ ☐ LOG Review by _____ ☐ Other Coordination: _____ ☐ Other Coordination: _____ ☐ Other Coordination: _____			2. Source: _____ Assigned to: _____ ☐ Disasters ES/FOIA ☐ Other (Explain) _____ RS/FOIA ☐ Requests Other _____ ☐ Procurement Agreement _____ ☐ Interagency Agreement Mission Assignment _____ ☐ Mission Assignment Date/Time: _____	
3. Immediate Action Required ☐ Yes ☐ No				
III. STATEMENT OF WORK (Operations Section Only)				
1. OPA Action Category		2. 24 Hour Phone #		3. Fax #
4. FEMA Project Manager		5. 24 Hour Phone #		6. Fax #
7. Statement of Work				8. See Attached
8. Estimated Completion Date			9. Estimated Cost	
V. ACTION TABLE (Operations Section Only)				
Reason / Disposition ☐ Accepted ☐ Rejected ☐ Requestor Notified				
FEMA Form ID-5-7 PREVIOUSLY FF 90-136 Page 1 of 2				

Visual 34: Single Point Ordering

Methods for placing single point orders can include:

- Voice (by telephone or radio)
- Fax
- Computer modem or digital display terminal

In single point ordering, the burden of finding the requested resources is placed on the responsible ordering point and not on the incident organization.



Visual 35: Multi-Point Ordering

Multi-point ordering is when the incident orders resources from several different ordering points and/or the private sector.

Multi-point ordering places a heavier load on incident personnel by requiring them to place orders through two or more ordering points.



Visual 36: Order and Request Resources Task Two: Reimbursement Documentation

The next order and request task is to ensure that documentation aligns with the reimbursement requirements:

- Document necessary approvals
 - Identify the types of approvals
- Preapproved vendors
- On-call contracts



Visual 37: EOC Resource Documentation

EOCs must document everything on which they spend time or funds related to an incident. The following list of required documentation, which corresponds to the type of expenses incurred include:

- Labor expenses
- Work performed materials
- Date used equipment
- Contracts

U. S. Department of Homeland Security
Federal Emergency Management Agency
Washington, D.C. 20542

Required Contract Provisions: Quick Reference Guide

KEY

Required/Recommended Provision ☐ ☐

Required/Recommended Provision and Required Exact Language ☐

Not Required for PA Awards (Grants) ☐

	Required Provision	Contract Criteria	Sample Language?
1.	Legal/contractual/administrative remedies for breach of contract	> Simplified Acquisition Threshold (\$250k)	No. It is based on applicant's procedures.
2.	Termination for cause or convenience	> \$30k.	No. It is based on applicant's procedures.
3.	Equal Employment Opportunity	Construction work	Yes. 41 CFR Part 60-3.4(b)
4.	Davis Bacon Act	Construction work	Not applicable to PA grants
5.	Copeland Anti-Kickback Act	Construction work > \$2k	Not applicable to PA grants
6.	Contract Work Hours and Safety Standards Act	> \$300k + mechanics or laborers	Yes. 29 CFR 5.5(b)
7.	Rights to Inventions made under a contract or agreement	Funding agreement	Not applicable to PA grants
8.	Clean Air Act and Federal Water Pollution Control Act	> \$300k	Yes
9.	Debarment and Suspension	All	Yes
10.	Byrd Anti-Lobbying Amendment	> \$300k; Certification	Yes. Clause and certification
11.	Procurement of Recovered Materials	Applicant is a state or political subdivision of a state. Work involves the use of materials.	Yes

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To Table of Contents

Visual 38: Resource Reimbursement

Reimbursement includes the payment of expenses incurred by resource providers for specific activities. EOC resource reimbursement processes include:

- Mechanisms for collecting bills
- Validating costs against the scope of the work
- Replacing or repairing damaged equipment
- Accessing reimbursement programs agreements



Visual 39: Documentation Approvals

Approvals to request reimbursement for:

- Services
- Travel
- Lodging
- Equipment
- Assignment of resources
- Personnel

Who is in your jurisdiction has approving authority?

[illegible]

Visual 40: Order and Resource Logistics Needs

EOC resource logistics include:

- Facilities
- Transportation
- Communications
- Supplies
- Equipment maintenance and fueling
- Food services (for responders)
- Medical services (for responders)
- All off-incident resources



The first task in demonstrating awareness of resource sources is to understand sourcing for various disciplines.



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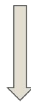
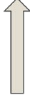
- Regional
- State – A contract between the state and the vendor. It spells out the specifics around the contract meaning budget, resource, etc.
- Local
- Tribal
- Territorial
- Federal
- Private sector/corporate
- Non-Governmental organization (NGO)
- Preapproved vendor – A contract with a vendor in which xxxxxxxx
- On-call contract – A contract that can be executed on demand.

Visual 41: Poll: EOC Pre-Approved Vendor List

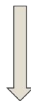
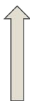


Visual 42: Transmitting Vertical & Horizontal Resource Requests

Columbia State EOC



Liberty County EOC



Central City EOC

Central City EOC → Jackson City EOC
Jackson City EOC → Central City EOC

Question:

What are some examples of parties who would be in each type of communication chain?



Student
Manual

Visual 43: Unit Six Summary

Congratulations! We have reviewed the following:

- Ordering and acquiring a resource based on a request.
- Analyzing a resource request based on the capability.
- Examining resource reimbursement requirements.



Unit 7: Resource Tracking

Visual 1: Unit 7: Resource Tracking

K2306 EOC Resources Support Skillset Course Unit 7: Resource Tracking

Visual 2: Unit Seven Objectives

After the conclusion of this unit, you will be able to:

- Determine how to track a resource as it relates to an EOC and field operations.
- Develop a process for tracking and monitoring a resource and supporting logistics from the requesting stage to the post-implementation stage.
- Determine the status of a resource and communicate that status to Incident Command and EOC stakeholders.

Visual 3: Class Discussion

Resource tracking is a crucial Skillset as it provides data from the request stage throughout demobilization and more.

What do you think are some of the challenges with resource tracking, and why?



Question:

Resource tracking is a crucial Skillset as it provides data from the request stage throughout demobilization and more.

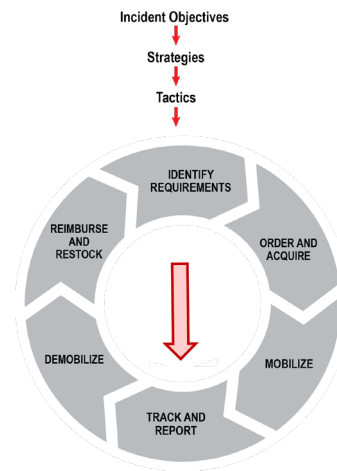
What do you think are some of the challenges with resource tracking, and why?



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Visual 4: Comprehensive Resource Management

Upon completion of Order and Acquire and Mobilize within the CRM cycle, move to “Track and Report.”



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When resources are “handed off” or mobilized to an operation to do the work Resource Management should work to track the asset along with any operational partners to ensure the asset is being used to its fullest before being released back to its home agency or to whom it belongs.

Visual 5: EOC Track Resources

There is one task category for Resource Tracking: Track Resources.

However, there are multiple associated tasks that fall under this task category.

EOC Manual Resource Tracking

Emergency Operations Center (EOC) Manual: Resource Tracking

Task Category: Track Resources
Develop, evaluate, and implement resource management plans for resource utilization.

TASKS	CODE	DEVELOPMENT	EVALUATION	IMPLEMENTATION
1. Develop resource management plans for resource utilization.	1.1			
2. Evaluate resource management plans for resource utilization.	2.1			
3. Implement resource management plans for resource utilization.	3.1			
4. Develop resource management plans for resource utilization.	4.1			
5. Evaluate resource management plans for resource utilization.	5.1			
6. Implement resource management plans for resource utilization.	6.1			

EOC Manual Resource Tracking

Task Category: Track Resources
Develop, evaluate, and implement resource management plans for resource utilization.

TASKS	CODE	DEVELOPMENT	EVALUATION	IMPLEMENTATION
1. Develop resource management plans for resource utilization.	1.1			
2. Evaluate resource management plans for resource utilization.	2.1			
3. Implement resource management plans for resource utilization.	3.1			
4. Develop resource management plans for resource utilization.	4.1			
5. Evaluate resource management plans for resource utilization.	5.1			
6. Implement resource management plans for resource utilization.	6.1			



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There is one task category for Resource Tracking: Track Resources. However, there are multiple associated tasks that fall under this task category.

Keep in Mind: Emergency management's overall goal is to enhance resiliency, and by tracking all resources within your EOC, you help to achieve this goal.

Visual 6: Track Resources Associated Tasks

There are multiple associated tasks aligned with tracking resources:

- Monitoring and tracking resources and supporting logistics
- Maintaining the status of requests
- Establishing communication channels
- Tracking resources from initial request through demobilization
- Anticipating, recognizing, planning for, and addressing resource drawdown levels



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There are multiple associated tasks aligned with tracking resources:

- Demonstrate knowledge of EOC and field operations resource tracking processes.
- Monitor and track resources and supporting logistics.
- Update requestor on request status, estimated time of arrival, and related logistical details.
- Establish communication channels to maintain resource status.
- Track resources from initial request through demobilization.
- Anticipate, recognize, plan for, and address resource drawdown levels for resources that remain under EOC management.
- Communicate with incident command and EOC stakeholders regarding resource status.

Visual 7: Resource Tracking Key to Resource Management

Emergency resource management must take place in the most efficient, expedient, and responsible manner possible. This ensures resources are:

- Quickly identified
- Accurately ordered and acquired
- Mobilized quickly
- Tracked and reported methodically
- Demobilized efficiently
- Restocked and reimbursed properly



Emergency resource management must take place in the most efficient, expedient, and responsible manner possible. This ensures resources are:

- Quickly identified
- Accurately ordered and acquired
- Mobilized quickly
- Tracked and reported methodically
- Demobilized efficiently
- Restocked and reimbursed properly



Student
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Question:

What is the Resource Management process?

Visual 8: EOC Resource Inventory

It is important for your EOC to maintain a process for inventory and tracking of all resources. Effective resource management involves:

- Establishing a resource inventory
- Keeping the information current and accurate



Visual 9: Resource Tracking

Resource tracking provides resource status management.

Establishes a single location for resources to be tracked including personnel, equipment, and supplies based on their location, time, cost, deployment, demobilization, and status.



Visual 10: Resource Tracking Systems

There are many resource tracking systems, ranging from simple status sheets to sophisticated computer-based systems. Regardless of the system used, it must account for the overall status of:

- Resources at the incident
- Movement of resources into and out of the incident “hot zone”



Visual 11: Communication Between ICP and an EOC for Tracking

An EOC must maintain effective communication throughout the resource management process including tracking. There are standard forms that are used for requesting and tracking resources.

These forms are:

- Completed
- Emailed
- In some cases, entered directly into an EOC resource tracking system



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Operating in an Incident Command System environment, there are standard forms that are used for requesting and tracking resources, such as the ICS 213 Resource Request. These forms are completed, emailed, or entered directly into an EOC. An EOC Operations receives the request; they determine if it's owned at the state level. If it's not owned at the state level, it's routed to the logistic department.

NOTE: This must be spelled out in an SOP for every EOC.

Visual 12: Resource Priority Levels and the EOC

Priority levels are assigned based on the incident priorities established by the ICP. This process establishes life-saving and other critical activities as the highest priorities.

The EOC will communicate these priorities and any additional guidance regarding fulfilling requests to resource managers.



DVIDS image Dave Palmer



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Priority levels are assigned based on the incident priorities established by the EOC by the incident action planning process, which will establish life-saving and other critical activities as the highest priorities.

Visual 13: Start Tracking Resources

Resource tracking should be done:

- Preparedness: Before an incident or planned event
- During an incident or event
- Post-incident or event
- Long-term post-incident or event



Resource tracking should be done:

- Preparedness: Before an incident or planned event
- During an incident or event
- Post-incident or event
- Long-term post-incident or event

Question:

What plans does your EOC have in place for long-term post-incident events?



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Visual 14: Resource Tracking Tool Examples

The process of how an EOC tracks and the tools used to track will differ per EOC. Some of the resource tracking tools may include:

- WebEOC
- Microsoft Office 365
- Microsoft Excel Tracking Sheet
- T-Cards



The process of how an EOC tracks and the tools used to track will differ per EOC. Some of the resource tracking tools may include:

- WebEOC
- Microsoft Office 365
- Microsoft Excel Tracking Sheet
- T-Cards

Question:

What type of tracking tool does your EOC use?



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Visual 15: T-Card System

An **ICS Form 219, Resource Status Card** or **T-Card**, is a simple tool to record and track the location and status of individuals, teams, vehicles, and other equipment.

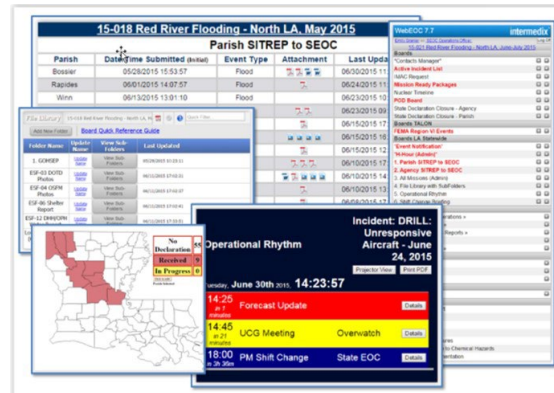
The cards are so-named because they are made of card stock and have a T-like shape. These cards are displayed in resource status or “T-Card racks” where they can be easily viewed, retrieved, and updated during the incident.



Visual 16: Online System - WebEOC

WebEOC is a secure, Internet-based emergency information management application that provides real-time information sharing of operational details from various government and public safety groups in response to an imminent threat, emergency or disaster.

Control Panel, Sitrep Board, Operational Rhythm, And File Library are some of the elements in WebEOC.



Visual 17: Class Discussion

Think about compliance as it relates to resource tracking. An EOC resource request manager should track and document the action taken on any request.

By documenting all action taken on requests, what can this help to achieve?



Think about compliance as it relates to resource tracking. An EOC resource request manager should track and document the action taken on any request.

Question:

By documenting all action taken on requests, what can this help to achieve?



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Visual 18: EOC Responsibilities

Resource tracking responsibilities are shared between the:

- EOC Resource Planning, which is responsible for tracking all resources assigned to the incident and their status (assigned, available, out of service)
- EOC Operations, which is responsible for tracking the movement of resources



Visual 19: EOC and Field Operations Resource Tracking

In an EOC, you must demonstrate knowledge of the EOC and field operations resource tracking processes. The process may vary based on the EOC and jurisdiction. Therefore, each EOC must have a process, SOPs, project plans, and checklists in place that include:

- How to document all resources
- Timeframes based on resources (may be aligned to priority levels)
- Resource allocation
- Resource reporting
- Communications plan
- Providing status updates



Visual 20: Monitoring and Tracking Resources

Monitoring and tracking resources and supporting logistics efficiently is essential for:

- Personnel safety
- Accountability
- Fiscal control

Resource monitoring should happen constantly.



Monitoring and tracking resources and supporting logistics efficiently is essential for:

- Personnel safety
- Accountability
- Fiscal control

Resource monitoring should happen constantly.



Student
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When operating in an Incident Command System environment, there is a standard form, the ICS213RR Form that will be:

- Emailed
- Faxed
- Entered directly in an EOC system

Visual 21: Monitoring and Tracking Logistics

Logistics tracking includes:

- Location of resources and supplies throughout the entire request until demobilization
- Where are the resources assigned to or deployed
- Have the resources left the vendor or are they in route



Visual 22: Possible Impacts of Not Properly Tracking Resources

By not properly tracking resources, may impact:

- Finance/budget
- Emergency planning
- Timing
- Infrastructure
- Forecasting of resources
- Predicting resources based on an event/emergency



If an efficient tracking process has not been established in your EOC and if you are not constantly monitoring the status and communicating the status out, it may impact:



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- Finance/budget
- Emergency planning
- Timing
- Infrastructure
- Forecasting of resources
- Predicting resources based on an event/emergency

Visual 23: Updating the Requestor on the Request Status

Providing the status of a resource request is an important task in an EOC.

The status update includes:

- Request status
- Estimated time of arrival
- Related logistical details

Key Point: The status also includes when a request is noted as “Filled” or “Closed” for proper tracking of the request.

RESOURCE ORDER		Initial Date/Time	2. INCIDENT/ PROJECT NAME	3. INCIDENT/ PROJECT ORDER NUMBER	4. OFFICE REFERENCE NUMBER
5. DESCRIPTIVE LOCATION/ RESPONSE AREA		6. SEC	TWIN	RNG	Base
		7. MAP REFERENCE		8. INCIDENT BASE/ PHONE NUMBER	
				9. JURISDICTION/ AGENCY	
11. AIRCRAFT INFORMATION		LAT		LONG	
12. Request Number		Ordered Date/Time	From	To	QTY
		RESOURCE REQUESTED	Needed Date/Time	Deliver To	From
		Agency ID	RESOURCE ASSIGNED	ESTD	ETA
		Released Date/Time	From	To	
13. ORDER RELATED		Req. No.	Date	Time	To
		From			
ACTION TAKEN		ORDER RELATED	Req. No.	Date	Time
		From			

ICS 240-3 (10/07) NFES 5470



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Resource request status communications must include time and date stamps throughout the process, most notably when a request is noted as “Filled” or “Closed” for proper tracking of the request.

Visual 24: EOC Resource Status Descriptions

Status	Description
New Request	Request has been submitted. No other action has occurred.
Assigned	Request has been assigned to the EOC Operations or Logistics sections, but no further action has been taken.
Brokered	Requester has been directed to potential resource providers from whom they can obtain the resource needed directly.
Partially Brokered	Requester has been directed to potential resource providers from whom they can obtain part of the resource needed directly.
Filled	All resources needed to fill the request have been ordered. Source and delivery information is updated within the Resource Request Tracking Sheet.

Visual 25: EOC Resource Status Descriptions, continued

Status	Description
Partially Filled	The order has been partially filled. Source and delivery information is updated within the Resource Request Tracking Sheet.
Rejected/ Unable to Fill	The EOC Logistics Section is unable to fill the request. This may be because a problem exists with the request or because the EOC is unable to find a resource provider.
Sent To	The order has been forwarded to another entity (e.g., county, RLST, or state) for processing.
Cancelled	The resource requester has cancelled the request with the EOC Logistics Section before it received the resources.
Closed	The request has been processed and reviewed by the Finance Section. No further action is required.

Visual 26: Activity 7.1 Breakout Group Exercise: Resource Requests

Review the scenario and develop a tracking process for the requests that are mentioned in the scenario. Please use the tasks and questions below to assist you.

1. List the resources that have been requested.
How would you track each request?
2. Establish a priority of fulfillment and list the information that the requesting party will need to know about that priority list.
3. WebEOC transition was not complete at the time of the storm. How would you track available resources and communicate to stakeholders the status of their requests?
4. Which of the requested resources could be impacted by established drawdown levels? Why would knowing this be important?



DVIDS image by Petty Officer 2nd Class Erik Swanson

Use the link to ICS Form 219 - T-Cards to set up your tracking system.

Activity

Review the scenario. After reviewing the scenario develop a tracking process for the requests that are mentioned in the scenario. Please use the tasks and questions below to assist you.

- List the resources that have been requested. How would you track each request?



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- Establish a priority of fulfillment and list the information that the requesting party will need to know about that priority list.

- WebEOC transition was not complete at the time of the storm. How would you track available resources and communicate to stakeholders the status of their requests?



Student
Manual,
continued

- Which of the requested resources could be impacted by established drawdown levels? Why would knowing this be important?

Visual 27: Resource Tracking Initial to Demobilization

Resource tracking must be completed from the initial request through:

- Hand-off to incident
- Demobilization (for resources that remain under EOC management)



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The Resource Request Form and Resource Request Tracking Sheet include sections to track the request process, resource deployment, and resource demobilization information; organizations can choose to track this information using these tools or track through other processes.

Visual 28: Resource Tracking Demobilization Process

Resource deployment and demobilization consists of the following process:

- Resource deployment
- Resource tracking
- Resource demobilization



Resource deployment and demobilization consists of the following process:



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- Resource deployment
- Resource tracking
- Resource demobilization

The Resource Request Form and Resource Request Tracking Sheet include sections to track the request process, resource deployment, and resource demobilization information; organizations can choose to track this information using these tools or track through other processes.

Visual 29: Resource Drawdown Levels

EOC resource management leaders must:

- Anticipate
- Recognize
- Plan for and address resource drawdown levels

Drawdown resources are considered unavailable outside the local or Geographic Area for which they have been identified.



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EOC resource management leaders must:

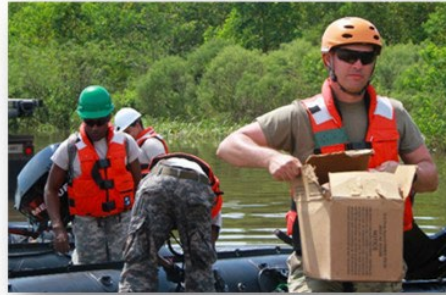
- Anticipate
- Recognize
- Plan for and address

Drawdown resources are considered unavailable outside the local or Geographic Area for which they have been identified.

Visual 30: National Ready Reserve Resources

National Ready Reserve implementation responsibilities are as follows:

- May be currently assigned to ongoing incidents.
- Must be able to demobilize and be enroute to the new assignment in less than 2 hours.
- Resources must have a minimum of 7 days left in 14-day rotation.
- May be assigned to incidents after being designated ready reserve.
- Designated ready reserve resources may be adjusted daily.
- NMAC will adjust ready reserve requirements as needed.
- NMAC may retain available resources within a Geographic Area, over and above the established Geographic Area drawdown level.



Remember, the NICC mobilizes National Ready Reserve resources through established ordering channels, as necessary.

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Visual 31: Individual Activity: Communication and Collaboration

Identify the key areas of communication and collaboration between the ICP and EOC as it relates to resource tracking and resource requests.

Once these areas are identified, what is the process of communicating with the ICP and other key stakeholders as it relates to resource requests and tracking resources?

Describe one task for each of the three reasons for accurate monitoring and tracking resources within the EOC.

- Personnel safety
- Accountability
- Fiscal control



Activity

- Identify the key areas of communication and collaboration between the ICP and EOC as it relates to resource tracking and resource requests.



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- Once these areas are identified, what is the process of communicating with the ICP and other key stakeholders as it relates to resource requests and tracking resources

- Describe one task for each of the three reasons for accurate monitoring and tracking resources within the EOC.



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Manual,
continued

Visual 32: Unit Seven Summary

Congratulations! We have reviewed the following:

- Tracking a resource as it relates to an EOC and field operations.
- Developing a process for tracking and monitoring a resource and supporting logistics from the requesting stage to the post implementation stage.
- Determining the status of a resource and communicate that status to Incident Command and EOC stakeholders.



Unit 8: Finance

Visual 1: Unit 8: Resource Tracking

K2306 EOC Resources Support Skillset Course Unit 8: Finance

Visual 2: Unit Eight Objectives

After this Unit, you will be able to:

- Administer financial management for jurisdictional expenditures.
- Advise EOC leadership and staff on financial matters associated with jurisdictional activities.

Visual 3: EOC Finance Skillset Task Categories

There are two (2) task categories for EOC Finance:

1. Administer financial management for jurisdictional expenditures
2. Advise EOC leadership and staff on financial matters associated with jurisdictional activities

EOC Skillset: Resource Sourcing			
Emergency Operations Center (EOC) Skillset: Resource Sourcing			
Task Categories: Understand potential sources Develop, evaluate, and implement courses of action for resource fulfillment			
Task Category: Understand potential sources			
TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate awareness of resource sources: - For various disciplines - Regional, state, local, tribal, territorial, Federal, private sector, and non-governmental organization (NGO) resources - Prepositioned supplies and on-call contracts	E, F, I, T		
2. Coordinate with resource acquisition personnel from other organizations to identify potential resources and gain better understanding of existing mechanisms	E, F, I		
3. Prioritize the allocation of scarce resources	E, F, I		
4. Demonstrate awareness of incident-specific fiscal and resource constraints	E, F, I, T		
Task Category: Develop, evaluate, and implement courses of action for resource fulfillment			
TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
5. Identify options for fulfilling resource requirements or requests: - Validate that options meet needs - Consider constraints - Consider support requirements - Estimate costs	E, F, I		
6. Identify and communicate resource support requirements, such as lodging, feeding, fuel, power, and equipment operation	E, F, I		
7. Develop courses of action for fulfilling resource requirements or requests. Factoring in considerations such as: - Incident needs and priorities - Logistical factors, such as transport, security, storage, and support requirements - Legal considerations - Financial requirements - Staffing requirements - Mixed and private sector, and Voluntary Organizations Active in Disaster (VOADs) capabilities	E, F, I		
Version: August 2018 8 Page			



Student
Manual

There are two (2) task categories for EOC Finance:

1. Administer financial management for jurisdictional expenditures
2. Advise EOC leadership and staff on financial matters associated with jurisdictional activities

Refer to handout **8.3 EOC Finance Skillset** for the two (2) task categories for the EOC Finance Skillset.

Visual 4: Task Category – Administer Financial Management for Jurisdictional Expenditures

There are tasks to help you administer financial management for jurisdictional expenditures within your EOC.

1. Demonstrate knowledge of jurisdictional and organizational procurement policies.
2. Demonstrate awareness of fiscal implications and requirements
3. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.
4. Seek information on the financial requirements of incoming resources, such as: National Guard assets and Mutual aid resources.
5. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.

Visual 5: Task Category – Administer Financial Management for Jurisdictional Expenditures, continued

There are tasks to help you administer financial management for jurisdictional expenditures within your EOC. Demonstrate knowledge of jurisdictional and organizational procurement policies.

6. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.
7. Collect, track, and document data related to funding and expenses.
8. Coordinate with organizational representatives to identify additional discipline-specific funding sources.
9. Monitor and verify costs and expenditures by reviewing requests, invoices, timecards, activity logs, and other available documentation or resources.

Visual 6: Task Category – Advise EOC leadership and Staff on Financial Matters

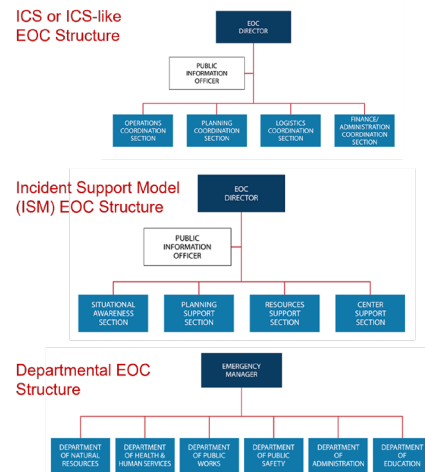
There are tasks to help you advise EOC leadership and staff on financial matters associated with jurisdictional activities within your EOC.

1. Review resource requests with resource management personnel to verify understanding of request and provide input on course of action: Suggest cost-efficient alternatives to obtaining requested resources, as appropriate.
2. Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.
3. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.
4. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.

Visual 7: Finance Skillset in Different EOC Structures

The National Incident Management System (NIMS) recognizes that EOCs can use different organizational structures, such as:

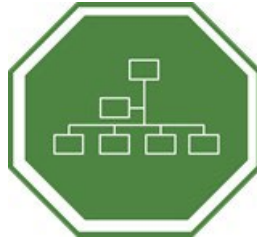
- ICS/ICS-like
- Incident Support Model (ISM) or any other structure
- Departmental



The National Incident Management System (NIMS) recognizes that EOCs can use different organizational structures, such as an ICS/ICS-like structure, a departmental structure, and incident support model, or any other structure.

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Visual 8: ICS and ICS-Like Structure Uses



Uses

- Familiar structure
- Mirrors organization of on-scene personnel
- Avoids additional EOC training requirements
- Supports situations when EOC staff may provide tactical direction

Visual 9: ICS and ICS-Like Structure Resource Management



Resource Management

- May adapt resource management processes
- EOC defines coordination and tracking of resource ordering functions
- Logistics focus may be on advance resource ordering
- Operations may order departmental resources
- Operations may track incident resources

Visual 10: ISM Structure Uses



Uses

- Focus on support functions
- Situational Awareness Section –EOC Director
- Resources Support Section:
 - Operations
 - Logistics
 - Comptroller/Purchasing
- Streamlines resource sourcing, ordering, and tracking
- Not organized for response and recovery efforts

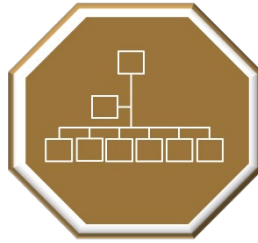
Visual 11: ISM Structure and Resource Management



Resource Management

- One-Stop - acquiring, deploying, and tracking
- Resources Support Section:
 - Ordering
 - Tracking
 - Funding
 - Reimbursement
- Organizational and Functional Representatives:
 - Resources
 - Expertise
 - Relationships

Visual 12: Departmental EOC Structure Uses



Uses

- Emergency Manager/EOC Director directly facilitates EOC
 - Planning
 - Reporting
 - Requests
 - Possibly EOC Logistics

Visual 13: Departmental EOC Structure Resource Management



Resource Management

- Have EOC roles and responsibilities
- Maintain normal authorities, responsibilities, and relationships
- Bring own resources, expertise, and relationships to EOC

Visual 14: Class Discussion: EOC Finance Experience

Finance is critical function in disaster response and recovery.

1. Who has worked in a finance role within an EOC?
2. What was the organizational structure of the EOC?
3. What was your role?
4. Are there any lessons learned you are willing to share?



Questions:

1. Who has worked in a finance role within an EOC?



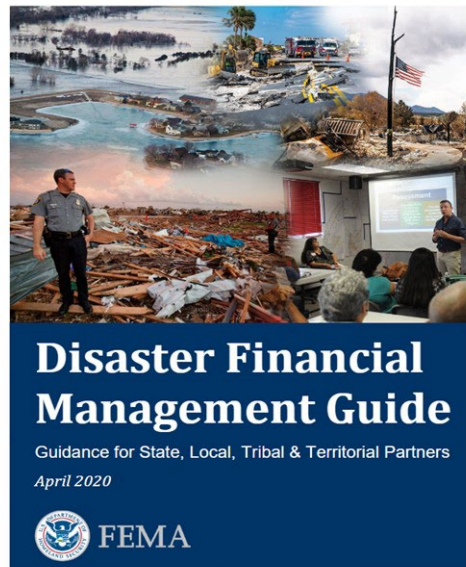
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2. What was the organizational structure of the EOC? Some may say it was like an ICS structure

3. What was your role?

4. Are there any lessons learned you are willing to share?

Visual 15: EOC Financial Management Resource



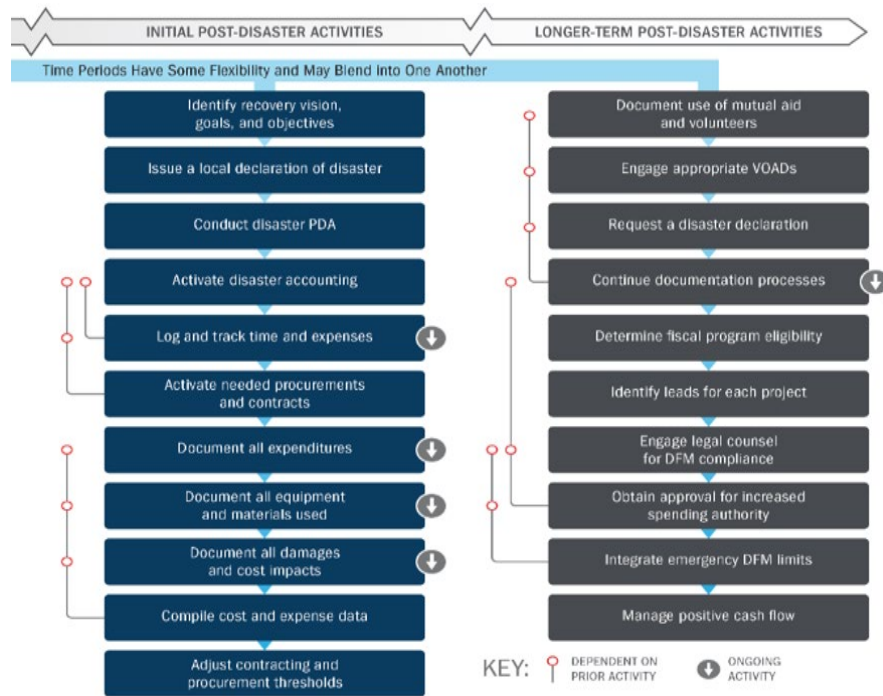
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The Disaster Financial Management Guide helps jurisdictions (e.g., state, local, tribal and territorial governments) establish and implement sound disaster financial management practices. It identifies the foundational Skills and Capabilities (Section 2) needed for successful disaster financial management and provides an overview of key Disaster Financial Management Activities (Section 3) that jurisdictions can complete before, during and after a disaster to support sound disaster financial management.

Resource:

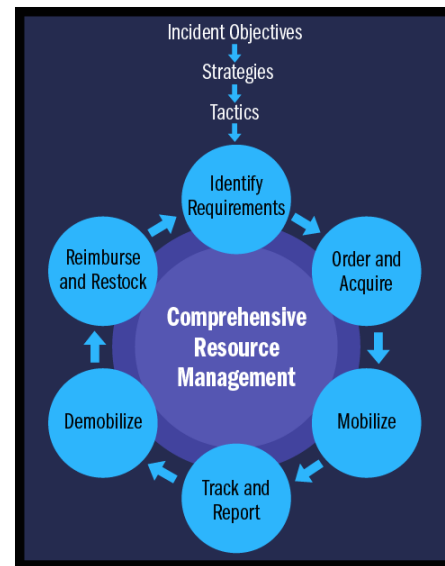
FEMA's [Disaster Financial Management Guide](#)

Visual 16: Financial Management Checklists



Visual 17: Comprehensive Resource Management (CRM)

In the EOC, Finances are an important part of each phase of the Comprehensive Resource Management Cycle.



Visual 18: EOC Financial Management Questions to Consider

1. What are your EOC's existing financial management practices?
2. What adjustments, if any, are needed to comply with procurement requirements?
3. Who would be on your EOC's disaster financial management team?
4. Has your EOC personnel participated in any community or individual financial management trainings?
5. Can your staff and departments access just-in-time training to refresh critical financial management skills?



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As an EOC leader with a financial management role, it is important to apply critical thinking to the entire financial process. As you think through SOPs, best practices, communication, and coordination here are some questions to consider when maintaining financial management around incidents.

1. What are your EOC's existing financial management practices?
2. What adjustments, if any, are needed to comply with procurement requirements?
3. Who would be on your EOC's disaster financial management team?
4. Has your EOC personnel participated in any community or individual financial management trainings?
5. Can your staff and departments access just-in-time training to refresh critical financial management skills?

Visual 19: Finance/Administrative Coordination

- Manage financial, administrative, and cost analysis
- Track expenditures for the EOC activation
- Maintain cost documentation for reimbursement
- Report costs to EOC leadership
- May provide admin support to other EOC sections
- May perform functions for Incident Command



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An EOC Finance team is responsible for providing support and managing financial related tasks. Some of these tasks and responsibilities include:

- Manage financial, administrative, and cost analysis
- Track expenditures for the EOC activation
- Maintain cost documentation for reimbursement
- Report costs to EOC leadership
- May provide admin support to other EOC sections
- May perform functions for Incident Command

Visual 20: Sources of Finance Staff

These are sources for identifying EOC Finance Staff:

- Permanent EM employees
- Jurisdictional employees
- Retired or inactive professionals



Due to the expertise needed, critical members of the team often include EOC:

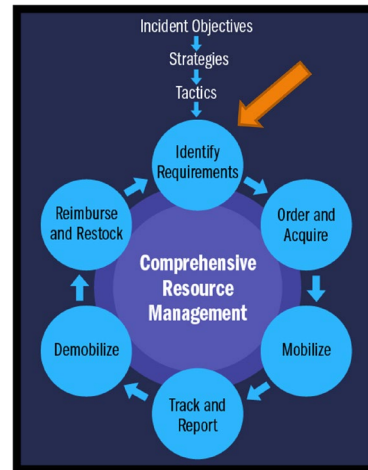


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- Permanent EOC employees
- Jurisdictional employees whose day-to-day duties include:
 - Purchasing
 - Contracting
 - Procurement
 - Accounting
- Retired or inactive professionals

Visual 21: CRM – Identify Requirements

Identify financial management requirements



Visual 22: Jurisdictional and Organizational Procurement Policies

Jurisdictional and organizational procurement requirements include:

- Federal, state, local, territorial, and tribal statutes/ordinances/resolutions
- Federal, state, local, territorial, and tribal administrative manuals
- EOC emergency operations plans and standard operating procedures



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Jurisdictional and organizational procurement requirements include:

- Federal, state, local, territorial, and tribal statutes/ordinances/resolutions
- Federal, state, local, territorial, and tribal administrative manuals
- EOC emergency operations plans and standard operating procedures

RESOURCES: Here are some examples of administrative accounting policies and manuals.

- [Sonoma County Administrative Policy Manual](#)
- [Washington State Administrative & Accounting Manual](#)
- [85.32 Goods and Services Expenditures](#)

Visual 23: Fiscal Implications and Requirements

Fiscal implications and requirements include:

- Financial responsibility rests with the resource requestor.
- Local emergency declarations, state emergency proclamations, and presidential major disaster declarations.
- Documentation requirements for reimbursement.
- Private sector may have financial responsibility and/or the ability to provide funding.



Fiscal implications and requirements include:

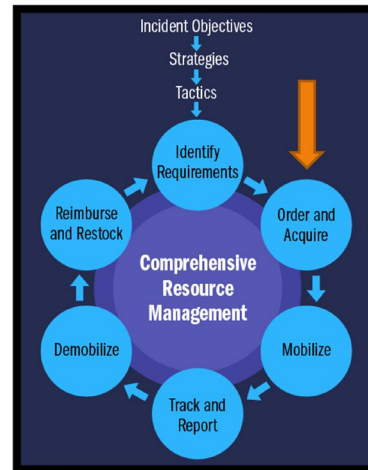


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- Financial responsibility rests with the resource requestor.
- Local emergency declarations, state emergency proclamations, and presidential major disaster declarations.
- Documentation requirements for reimbursement.
- Private sector may have financial responsibility and/or the ability to provide funding.

Visual 24: CRM – Order and Acquire

Financial management when Ordering and Acquiring EOC resources



Visual 25: Review Resource Requests

When reviewing resource requests:

- Verify understanding of request
- Suggest cost efficient alternatives



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As financial leaders in an EOC, you should review resource requests with your resource management personnel to verify understanding of request and provide input on the course of action.

Visual 26: EOC Coordination and Stakeholders

It is important to coordinate with other EOC stakeholders as it pertains to finance. This includes:

- Resource management personnel
- Legal personnel
- EOC leadership



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It is important to coordinate with other EOC stakeholders as it pertains to finance. This includes:

- Resource management personnel
- Legal personnel
- EOC leadership

Visual 27: Additional Discipline-Specific Funding Sources

- Jurisdictional disaster response accounts
- Fire Management Assistance Grants
- Department of Housing and Urban Development Disaster Recovery Programs
- Small Business Administration Loans
- Trade organizations, non-profit organizations, and foundations



It is important to have awareness of all funding sources within your EOC. Additional discipline-specific fund sources include:



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- Jurisdictional disaster response accounts
- Fire Management Assistance Grants
- Department of Housing and Urban Development Disaster Recovery Programs
- Small Business Administration Loans
- Trade organizations, non-profit organizations, and foundations

Information about these funding sources can be obtained from agencies/organizations participating in EOC activations, public-private relationships, or research on the Internet.

Visual 28: Financial Requirements of Incoming Resources

- Local mutual aid agreements
- Intrastate mutual aid legislation
- National Guard: State Active Duty (SAD) vs. Title 32
- Emergency Management Assistance Compact (EMAC)



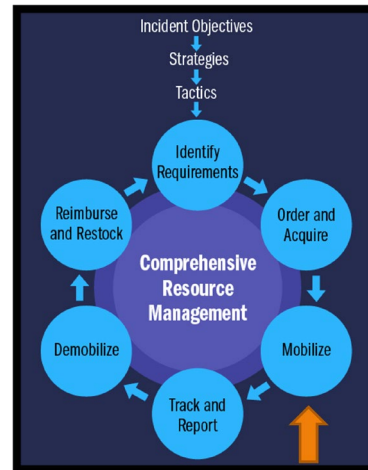
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Here are some examples of Mutual Aid Plans.

- [Washington Mutual Aid System \(WAMAS\)](#) Provide the WAMAS Overview or the WAMAS Operations and Deployment Guide as a pdf file.
- [Minnesota Intrastate Mutual Aid Plan](#)
- [EMACWeb.org](#)

Visual 29: CRM – Mobilize

Financial management during Resource Mobilization



Visual 30: Protocol To Maintain Financial Documentation

Protocol to maintain financial documentation include:

- Departmental and agency administrative manuals
- EOC emergency operations plans and standard operating procedures
- Federal Public Assistance and Individual Assistance
- Ad-hoc funding sources: CARES Act



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Every public safety department and government agency has its own or jurisdictional existing policies and procedures to track and document payroll (including regular time, overtime, fringe benefits, workman's compensation), contracts, procurements, claims, etc. These organizational and jurisdictional policies and procedures are used to track and maintain financial documentation. This is referred to as cost tracking mechanisms. The cost tracking mechanisms remain in effect during EOC activations. They are augmented with EOC Standard Operating Procedures and job aids.

Resources:

Example Cost-Tracking Spreadsheets

[New Mexico Department of Homeland Security and Emergency Management EOC Finance Section](#)

Visual 31: Monitor and Verify Cost and Expenditures

Monitoring and verifying cost and expenditures include:

- Verifying accuracy of all documentation
- Ensuring completeness of all documentation
- Tracking total costs and expenditures
- Ensuring compliance with financial policies and procedures

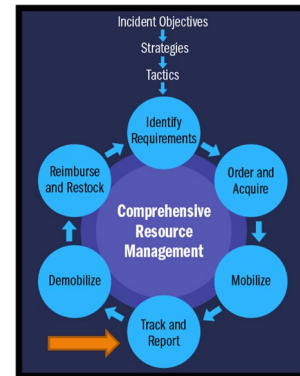


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It is important to verify the accuracy of all financial documentation, especially dates, times, and amounts. Double-check all calculations. Resolve potential discrepancies between documents pertaining to the same cost or expenditure.

Visual 32: CRM – Track and Report

Tracking and Reporting finances in the EOC



Visual 33: Cost Tracking Mechanisms

Cost tracking is a financial planning system that begins in the early stages of EOC activations. It requires continuous communication to ensure as much accuracy as possible.



	188,948	328,138	
3,640		7,206	
2,287		4,595	
3,416		6,917	
1,827		3,684	
26,564		53,797	2
426		844	
1,579		3,141	1
3,499		6,886	3
15,288		30,531	15
21,212		40,947	30

Cost tracking is a financial planning system that begins in the early stages of EOC activations. It requires continuous communication to ensure as much accuracy as possible.

Cost tracking all revolves around four main functions:

1. Resource Planning
2. Estimation
3. Budgeting
4. Control



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STUDENT REFERENCE: Disaster Response Cost Recovery Workbook (Include as a downloadable Excel Workbook and PDF guide)

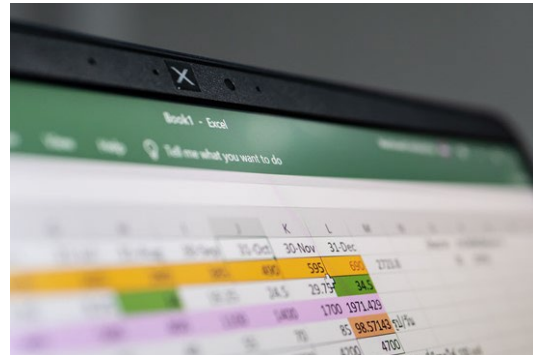
The United State Fire Administration and the National Fire Academy have developed simple Excel workbooks and examples to assist with tracking costs related to disaster response and recovery and to assist with inventory control and supply reordering.

The New Mexico Department of Homeland Security and Emergency Management also provides an Example Cost-Tracking Spreadsheet

[New Mexico Department of Homeland Security and Emergency Management EOC Finance Section](#)

Visual 34: Class Discussion: Cost Tracking Mechanism

What is your cost tracking mechanism?



Question:

What is your cost tracking mechanism?



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Visual 35: Personnel Tracking Worksheet

[illegible]

Visual 36: Equipment Cost Tracking

A	B	C	D	E
Equipment Type, Kind, Description	Code Number / Identifier	Total Hours Used	Rate	Total Cost
Ambulance, 210 HP	Medic 2	18	\$ 41.18	\$ 741.24
Truck, Pu,per, 1500 GPM	Engine 2	12	\$ 81.10	\$ 973.20
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
				\$ -
Total				\$ 1,714.44

Visual 37: Resource Burn Rate

Burn rate: The rate at which resources are being expended during emergency response.

It is critical to establish and monitor burn rates for all resources, including money, equipment, and personnel.



Visual 38: Communicating Burn Rate as a Part of Situational Awareness

Communicate situational awareness information includes:

- EOC operational briefings
- Situation Reports
- Common Operating Picture
- Senior leadership briefings



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Communicate situational awareness information includes:

- EOC operational briefings
- Situation Reports
- Common Operating Picture
- Senior leadership briefings

Visual 39: Burn Rate Awareness

Situational awareness of burn rates are critical information requirements for informed decision-making in an EOC:

- Resource needs assessment
- Resource availability/procurement options
- Resource allocation and prioritization
- Resource / logistical planning



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Establishing and maintaining resource burn rates are critical information requirements for informed decision-making in an EOC:

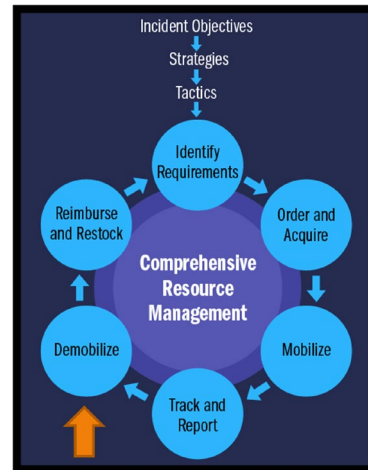
- Resource needs must be assessed in a timely manner based on requests from the first responders.
- Resource burn rates may drive the need to explore alternate resource procurement sources and mechanisms.
- Resource burn rates inform the allocation and prioritization of critical resources.
- Knowledge of resource burn rates will facilitate resource planning to avoid future shortfalls.

Resources:

The Centers for Disease Control and Prevention provides an example of a [Burn Rate Calculator](#)

Visual 40: CRM – Demobilize

Financial Management during Demobilization



The Nevada Division of Emergency Management provides an example [Overview of Documentation and Demobilization](#).

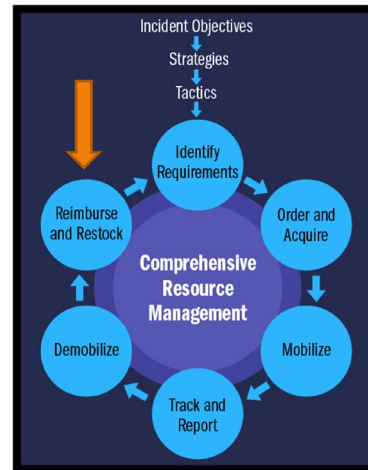
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Visual 41: Demobilization Check-Out (ICS 221)

DEMobilIZATION CHECK-OUT (ICS 221)			
1. Incident Name: _____		2. Incident Number: _____	
3. Planned Release Date/Time: _____		4. Resource or Personnel Released: _____	
Date: _____ Time: _____		5. Order Request Number: _____	
6. Resource or Personnel: You and your resources are in the process of being released. Resources are not released until the checked boxes below have been signed off by the appropriate overhead and the Demobilization Unit Leader (or Planning Section representative).			
LOGISTICS SECTION			
☐ Unit/Manager	Remarks	Name	Signature
☐ Supply Unit			
☐ Communications Unit			
☐ Facilities Unit			
☐ Ground Support Unit			
☐ Security Manager			
☐			
FINANCE/ADMINISTRATION SECTION			
☐ Unit/Leader	Remarks	Name	Signature
☐ Time Unit			
☐			
OTHER SECTION/STAFF			
☐ Unit/Other	Remarks	Name	Signature
☐			
☐			
PLANNING SECTION			
☐ Unit/Leader	Remarks	Name	Signature
☐			
☐ Documentation Leader			
☐ Demobilization Leader			
7. Remarks:			
8. Travel Information:			
Estimated Time of Departure: _____		Room Overnight: ☐ Yes ☐ No	
Destination: _____		Actual Release Date/Time: _____	
Travel Method: _____		Estimated Time of Arrival: _____	
Manifest: ☐ Yes ☐ No		Contact Information While Traveling: _____	
Number: _____		Area/Agency/Region Notified: _____	
9. Reassignment Information: ☐ Yes ☐ No			
Incident Name: _____		Incident Number: _____	
Location: _____		Order Request Number: _____	
10. Prepared by: Name: _____		Position/Title: _____ Signature: _____	
ICS 221		Date/Time: _____	

Visual 42: CRM – Reimburse and Restock

Financial Management for Reimbursement and Restocking



Visual 43: Reimbursement and Restocking

- Reimbursement includes the payment of expenses incurred by organizational representatives and their agencies
- Reimbursement processes are important for establishing and maintaining organizational representation readiness
- Reimbursement procedures are usually included in the EOCs mutual aid and assistance agreements.
- EOCs have reimbursement tools for collecting, validating and reimbursing organizational representatives for resources
- Restocking is replenishing depleted resources.

**Resources:**

FEMA has prepared an informative presentation on [Managing Resources](#).

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Visual 44: Ensure State Partners Gets Reimbursed for Resources

- Emergency Management Assistance Compact (EMAC) defines eligible and ineligible expenses for which state agencies that assist or provide resources to other states during emergency incidents can be reimbursed
- Covers 50 states, the District of Columbia, Puerto Rico, the U.S. Virgin Islands, Guam and the Northern Mariana Islands
- Mission Ready Package (MRP) is everything organizations need to conduct an emergency mission identified in a single file with the associated costs

Visual 45: Ensure Non-Government Organizations are Reimbursed for Resources

- Join Mutual Aid and Assistance Programs
- Implement Accounting, Documentation and Emergency Procurement Procedures and Personnel Policies
- Maintain Incident Records and Documents
- Maintain Inventory of Resources and Supplies
- Coordinate Efforts with Emergency Management Agencies at the Local, State and Federal Level

Visual 46: Activity 8.1: Financial Management

PURPOSE:

Apply the concepts of administration of financial management for jurisdictional expenditures and advising EOC leadership and staff on financial matters associated with jurisdictional activities to a fictitious scenario.

SCENARIO:

See the handout for details of the scenario for this exercise and questions to be addressed.



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Activity:

Complete the following action items:

- Based on the given scenario, describe financial management in your jurisdictions' EOC by answering a series of questions. Refer to the handout for questions.
- Be prepared to discuss your responses with the class.

Visual 47: Group Activity: Financial Management in the EOC Instructions

Break into groups and take a few minutes to read the La Nina Scenario Timeline.

Identify a Recorder and Reporter for your group.

Work with your team to answer the following questions:

1. Which finance functions are needed for this incidents?
2. What type of incident financial documents are required?
3. Which funding sources and limitations are specific to this situation?
4. What system will you use to monitor and verify cost and expenditures?
5. What type of legal guidance is required?
6. Where would you look for financial staff to support the EOC response?
7. What equipment needs to be tracked for the incident, and how will you accomplish it?
8. What internal/external personnel needs to be tracked and how will you do it?

Record your answers on the whiteboard or notepad and prepare to share them with the class.

You have 30 minutes to complete the exercise. You will receive a popup notice when it is time to return to class.

Visual 48: Class Discussion: Financial Management in the EOC

What did you learn or have reaffirmed about the EOC financial management skillset task categories below:

- Administering financial management for jurisdictional expenditures in the EOC
- Advising EOC leadership and staff about financial matters associated with jurisdiction activities in the EOC

Visual 49: Unit Eight Summary

Congratulations! We have reviewed the following:

- Administer financial management for jurisdictional expenditures.
- Advise EOC leadership and staff on financial matters associated with jurisdictional activities.



Unit 9: Creating Position Task Books with EOC Skillsets

Visual 1: Unit 9: Creating Position Task Books with EOC Skillsets

K2306 EOC Resources Skillset Course

Unit 9: Creating Position Task Books with EOC Skillsets

Visual 2: Unit Nine Objectives

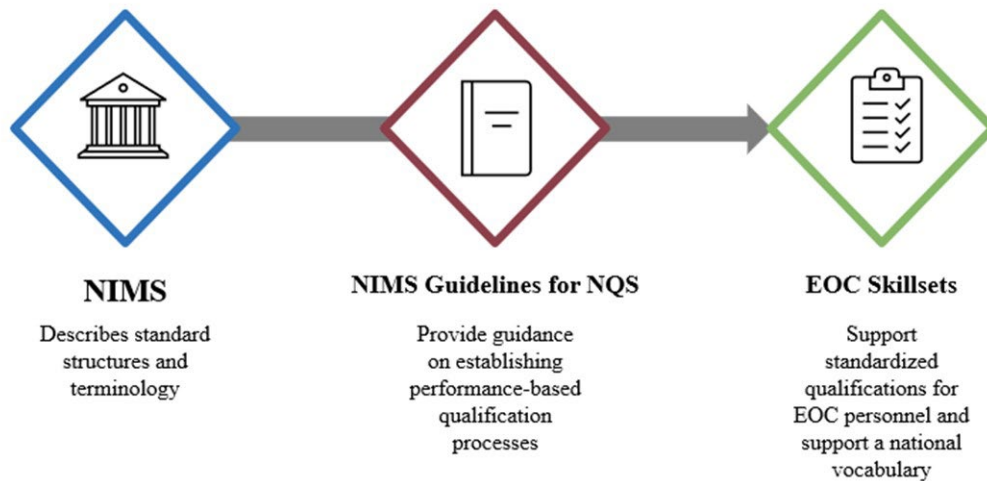
After this Unit, you will be able to:

- Explain what a Position Task Book (PTB) is and how it will be used in an EOC.
- Demonstrate what the EOC Skillsets are and how they are used in an EOC.
- Formulate an EOC PTB using EOC Skillsets.

Visual 3: Poll: What Kind of EOC Qualification System Do You Have?



Visual 4: Background on NQS Skillsets



Student Manual

NIMS describes standard structures and vocabulary to enable incident personnel from across the Nation to work together to save lives, stabilize incidents, and protect property and the environment. A performance-based approach to personnel qualifications ensures the capabilities of personnel to perform in incident-related positions. The NIMS Guideline for the NQS provides guidance for organizations establishing performance-based qualifications processes, including personnel qualification, certification, and credentialing.

NQS provides jurisdictions and organizations with guidance to certify their personnel according to national baseline qualifications. Through NQS, FEMA is developing common terminology, templates and other tools, and a standard approach for qualifying, certifying, and credentialing deployable incident personnel—enabling mutual aid partners to communicate resource needs quickly and precisely.

Visual 5: EOC Skillsets

Establish minimum performance criteria

- 3 “level of responsibility” skillsets
- 17 “functional” skillsets



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EOC Skillsets establish a minimum performance criterion. There are 20 skillsets in full, however they are broken into two groups:

- 3 are under “Level of Responsibility”
- 17 are under “Functional”

Within the 17 under Functional Skillsets is the Skillset for Resources. We discussed Resources Skillset starting in Unit 2.

The purpose of EOC Skillsets is not to replace the existing qualification systems, but to provide minimum baselines when qualifications do not exist. Using these skillsets allows you to build the capabilities and qualifications of EOC personnel, and, in doing so, help improve the professionalism of EOC personnel and contribute to the resiliency of our Nation.

Visual 6: Overview of EOC Skillsets and Resource Support Skillsets

Level of Responsibility	
Coordination and Individual Contribution	
Leadership	
Policy and Direction	
Function	
Action Tracking	Public Affairs Coordination
Center Management	Recovery Coordination
Document and Records Management	Resource Ordering and Acquiring
EOC Facility Management	Resource Sourcing
Finance	Resource Tracking
Legal Counseling	Safety Advising
Organizational Representation	Situational Awareness
Performance Improvement	Understanding the Resource Requirement
Planning	

Question:



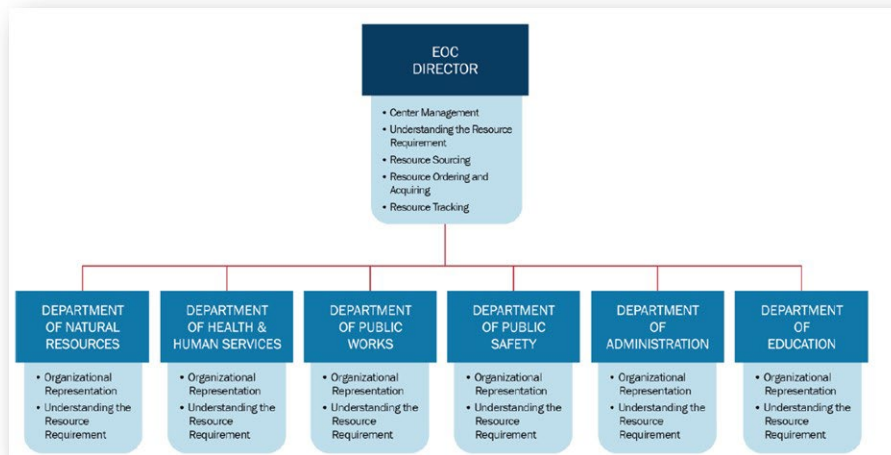
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Why will these skillsets provide ease to the challenge of sharing EOC personnel across jurisdictional lines and organizations?

The EOC Skillsets User Guide is intended for use by EOC personnel at any level of government and within the private sector and NGOs. It explains what EOC Skillsets are and how to use them to construct EOC PTBs, supporting the qualification and certification of EOC personnel.

Refer to the "EOC Skillsets Summary" handout for the full list of skillsets along with descriptions and task categories.

Visual 7: Example on Adaptability and Alignment of EOC Skillsets in a Departmental Structure



Question:

All EOC leaders with a support resources role should shape their organizational staffing based on the missions and resources associated with their EOC. What does this mean to you?



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Visual 8: Common EOC Personnel Functions and Skillsets

Common EOC Functions

- Collect, analyze, and share information
- Support resource needs, requests, allocation, and tracking
- Coordinate plans and determine current/future needs
- Sometimes provide strategic coordination and policy direction

Skillsets (or Discrete Responsibilities)

- Planning Skillset
- Action Tracking Skillset
- Finance Skillset
- And 17 more...

Enable the Building of PTBs for EOC Personnel



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EOC personnel support on-scene actions and, like on-scene personnel, can be shared across organizational and jurisdictional lines. Unlike on-scene personnel, however, there is no nationwide structure like ICS guiding all EOCs. Instead, EOCs across the nation define their own positions, processes, and structures. This diversity is necessary, given the unique missions, authorities, and resources of EOCs, but it can create challenges for EOC leaders in requesting and sending personnel through mutual aid. FEMA developed the EOC Skillsets to help relieve these challenges. EOC Skillsets break the common EOC functions down into discrete responsibilities aligned with demonstrable tasks that can be used to build EOC PTBs, qualify personnel, and request support.

Visual 9: EOC Skillsets Format

Skillset Title

Reflects the function or level of responsibility described in skillset

Task Categories

Items summarizing groups of similar tasks within skillset

Tasks

Specific, demonstrable actions to be demonstrated by trainees

Codes

How tasks must be demonstrated for evaluation

EOC Skillset: Planning

Emergency Operations Center (EOC) Skillset: Planning

Task Categories:
Reference pre-incident plans
Develop and write EOC action plans and other incident-specific plans
Disseminate plans
Facilitate the ongoing planning process

Task Category: Reference pre-incident plans

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Gather relevant pre-incident plans, best practices, lessons learned, etc. from internal and external sources: • Obtain additional plans from stakeholders and partners	E, F, I, J		
2. Obtain additional plans or supporting documents, such as annexes and standard operating procedures, as necessary.	E, F, I		
3. Identify areas where EOC personnel may need to develop plans or supporting documents.	E, F, I		

Task Category: Develop and write EOC action plans and other incident-specific plans

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
4. Demonstrate knowledge of the EOC planning process: • Prepare action plan development • Development of other incident-specific plans	E, F, I, J		
5. Facilitate the development of objectives and/or strategies to achieve desired outcomes: • Ensure integration of incident command objectives, priorities, and senior leadership guidance into EOC planning	E, F, I		
6. Facilitate the assessment and revision of objectives and/or strategies to ensure that they align with desired outcomes.	E, F, I		
7. Establish communication with stakeholders to facilitate planning and problem-solving: • Understand and address stakeholder expectations	E, F, I		

The EOC PTB reflects the minimum criteria to qualify or recertify for a position. The AHJ has the authority to add content to the baseline EOC PTB tasks, as necessary.

Definitions

EOC Skillset: An EOC Skillset describes an EOC function in terms of discrete responsibilities aligned with demonstrable tasks. Skillsets can either reflect a function in an EOC (such as Planning) or a level of responsibility (such as Leadership). Skillsets combine together to form EOC PTBs.

Task Category: Task Categories summarize groups of similar tasks in the skillset.

Task: A specific, demonstrable action necessary for successful performance in a position. Trainees must demonstrate completion of required tasks.

EOC PTB Task Codes: Each task in the EOC PTB has at least one corresponding code conveying the circumstances in which the trainee can perform the task for evaluation. Evaluators may assess trainees during incidents, in classroom simulations and training sessions, in functional and full-scale exercises, and in other work situations. If a task has multiple codes, the evaluator may evaluate in ANY of those circumstances; the trainee does not need evaluation in all of the listed circumstances.

- Code C: Task performed in training or classroom setting, including seminars and workshops.
- Code E: Task performed during a full-scale exercise.
- Code F: Task performed during a functional exercise.



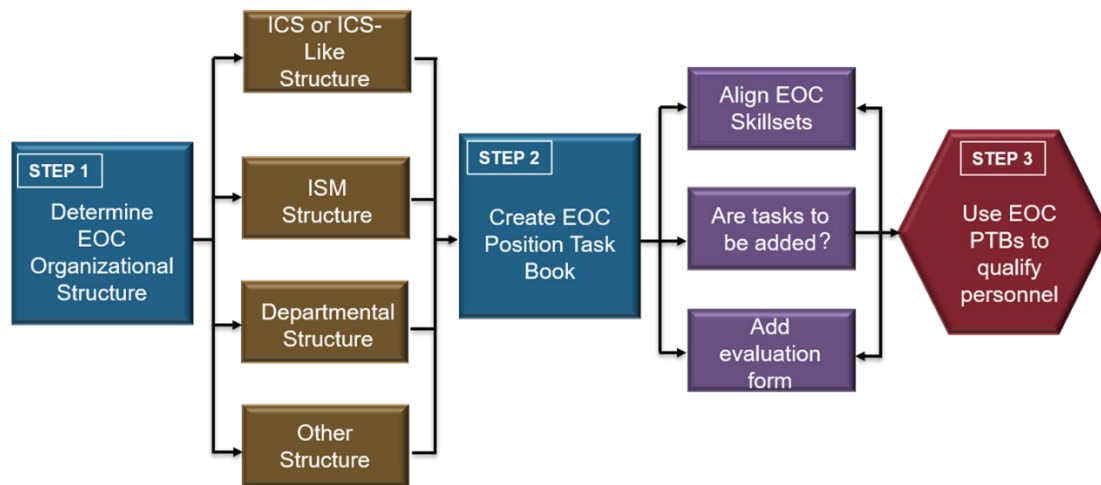
Student
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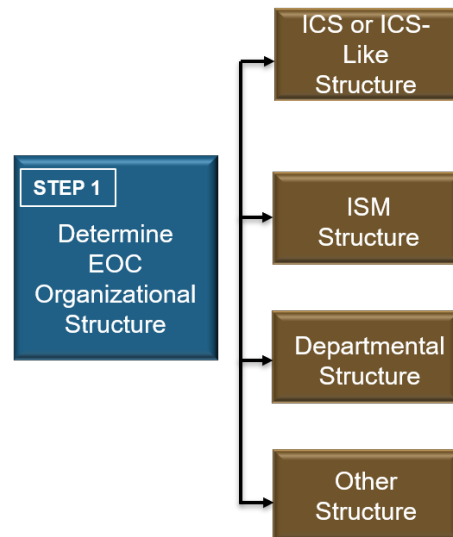
- Code I: Task performed during an incident or event. Examples include oil spill, search and rescue operation, hazardous materials (hazmat) response, fire, and emergency or non-emergency (planned or unplanned) events.
- Code J: Task performed as part of day-to-day job duties.
- Code T: Task performed during a tabletop exercise.
- Code R: Task performed very rarely and required only if applicable to the event.

Visual 10: Steps to Using EOC Skillsets to Create an EOC PTB



Visual 11: Step 1: Determine Your EOC Organizational Structure

EOCs vary in missions, authorities, and resources, there is no “one size fits all.” Once your EOC is established, you are ready to move forward to Step 2.



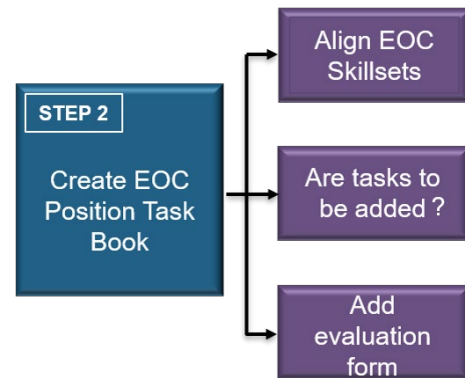
Student
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Step 1 is focused on determining the EOC organizational structure. An EOC structure may already be established. Use this process to validate the current structure.

Visual 12: Step 2: Create EOC PTBs

This involves 3 actions:

1. Aligning EOC Skillsets with organizational structure.
2. Determining if additional tasks should be added to existing skillset.
3. Adding the evaluation form and any additional, as applicable, documentation to PTB.



Step 2 is where the PTB is formulated for EOC personnel needed, using the 20 EOC Skillsets we discussed earlier. When creating your EOC PTB, there are 3 actions:

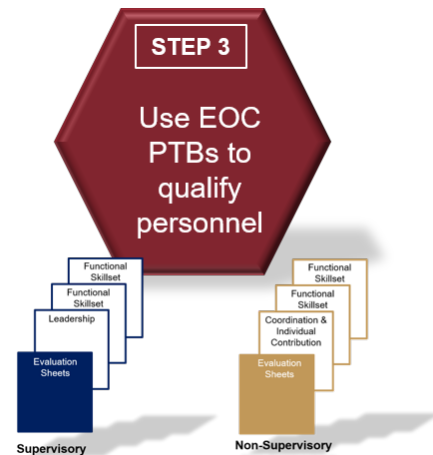


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1. **Action 1:** Aligning your EOC Skillsets with your organizational structure. As you group skillsets together to align position responsibilities and build your desired reporting structure, consider the following guidelines:
 - You can assign the same skillset to multiple positions.
 - You can assign multiple skillsets to a single position.
 - You should assign a level of responsibility skillset to every position.
 - Assign Coordination and Individual Contribution to every position in your EOC.
 - Additionally, assign the Leadership skillset to all supervisory positions in your EOC.
2. **Action 2:** Determining whether there is a need to add additional tasks to individual skillsets.
3. **Action 3:** Ensuring you add evaluation forms and any other applicable documentation to complete the task books.

Visual 13: Utilize PTBs to Qualify Personnel

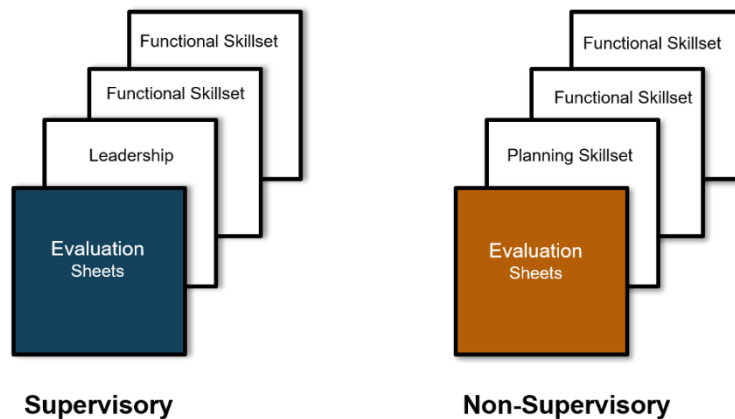
The PTBs you create are tools that support your EOC's qualification, certification, and credentialing process for your EOC personnel.



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In Step 3 of using EOC Skillsets, personnel must be assessed, using the PTB, by qualified evaluators during incidents, exercises, and/or other work situations. Once tasks are demonstrated properly, a qualified evaluator will sign off on your PTB, indicating you completed and passed each task within the EOC Skillset.

Visual 14: Finished EOC PTBs



Tips for compiling an EOC PTB:



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- Include a level of responsibility skillset such as:
 - The Coordination and Individual Contribution Skillset
 - The Coordination and Individual Contribution and the Leadership Skillsets
 - The Policy and Direction Skillset
 - Skillset order is not important.
- Evaluators can evaluate tasks in any order, so the order in which the skillsets appear in the EOC PTB does not matter.
- Use any title that meets your needs. Position names vary across the country.
- Use the title that makes the most sense for your organization.
- All EOC positions have the Coordination & Individual Contribution Skillset included in their PTB.

Visual 15: Creating a PTB – Step 1a – “We Do Together”

Step 1a:

Fill in the "Skillsets Crosswalk" PDF to align the EOC Skillsets with the Logistics Lead position, using the skillsets assigned to this course.

Table 2: Skillsets Crosswalk

Position Titles	EOC Director	Logistics Support Unit Lead	Transportation Unit	Personnel Unit	Supply Procurement Unit	Facilities Unit	Resource Tracking Unit	Finance/Admin Unit Lead	Time Keeping Unit	Cost Accounting Unit	Compensation and Claims Unit	Purchasing Unit	Recovery Unit	Demobilization Unit				
EOC Skillsets																		
Coordination and Individual Contribution	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Leadership																		
Policy Direction																		
Action Tracking																		
Center Management																		
Document and Records Management																		
EOC Facility Management																		

Visual 16: Individual Activity 9.1: Creating a PTB – Step 1b – “You Do”

STEP 1b: Fill in the "Skillsets Crosswalk" PDF to align the EOC Resources Support Skillsets with the positions in your organizational structure.

Table 2: Skillsets Crosswalk

Position Titles	EOC Director	Logistics Support Unit Lead	Transportation Unit	Personnel Unit	Supply Procurement Unit	Facilities Unit	Resource Tracking Unit	Finance Admin Unit Lead	Time Keeping Unit	Cost Accounting Unit	Compensation and Claims Unit	Purchasing Unit	Recovery Unit	Demobilization Unit					
EOC Skillsets																			
Coordination and Individual Contribution	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X
Leadership																			
Policy Direction																			
Action Tracking																			
Center Management																			
Document and Records Management																			
EOC Facility Management																			

DIRECTIONS: You have now performed this step with the Instructor and now it is your turn to complete this step on your own, aligning the skillsets with roles within your own (current) EOC.

- Individually, fill out the "Skillsets Crosswalk," aligning the EOC Resources Support Skillsets with up to 18 positions in your organizational structure. When completing this crosswalk for an entire EOC, be sure that all 20 skillsets appear somewhere in the table.
 - This includes assigning the Coordination and Individual Contribution Skillset to every position and assigning the Leadership Skillset to every supervisory role.
 - Use your own EOC model, or use one of the models (ICS, ISM, Departmental) that we discussed in Unit 2.
- Remember that the file has a section for instructions.
- Add in position titles to Table 2, Row 1.
- Review the brief descriptions of each skillset on the "Table 1: Skillset Description" to determine which skillsets apply to each position in your EOC.
- Align the skillsets to the applicable to the position by placing an “X” in the cell at the intersection of the appropriate position title and skillset.
 - Note that Coordination and Individual Contribution already has an "X" because it applies to every EOC role.
- You will have 30 minutes to complete this activity.



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Visual 17: Creating a PTB – Step 2a – “We Do Together”

STEP 2a: The instructor will show the “Logistics Lead EOC PTB” PDF where they have:

1. Reviewed the tasks within each skillset.
2. Removed each skillset that is not applicable.
3. Added additional tasks, as needed (up to 3).
4. Added the evaluation form and any other applicable documentation to the PTB.

EOC Skillset: Coordination and Individual Contribution

Emergency Operations Center (EOC) Skillset: Coordination and Individual Contribution

Task Categories:
Complete common coordination and accountability tasks associated with all positions within the EOC

Task Category: Complete common coordination and accountability tasks associated with all positions within the EOC

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: ✓ Demonstrate general awareness of local risks and hazards	C, E, F, I, T		
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: ✓ Demonstrate knowledge of information management systems, such as incident management software	E, F, I		

Visual 18: Individual Activity 9.2: Creating a PTB – Step 2b – “You Do”

STEP 2b: Using the “EOC PTB Template” PDF:

1. Review the tasks within each skillset, identifying what is needed for your current or desired EOC resources/logistics position.
2. Note which skillsets you would keep.
3. Add additional tasks, as needed (up to 3).
4. Add applicable documentation, noting that the evaluation form is already included.

EOC Skillset: Coordination and Individual Contribution

Emergency Operations Center (EOC) Skillset: Coordination and Individual Contribution

Task Categories:
Complete common coordination and accountability tasks associated with all positions within the EOC

Task Category: Complete common coordination and accountability tasks associated with all positions within the EOC

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate understanding of EOC activation and operations, including how your function relates to other incident support activities: ✓ Demonstrate general awareness of local risks and hazards	C, E, F, I, T		
2. Maintain positive, calm demeanor to promote a positive work environment.	E, F, I		
3. Demonstrate effective communication skills, such as the ability to translate technical jargon into plain language.	E, F, I, J		
4. Comply with relevant health and safety requirements.	E, F, I		
5. Demonstrate understanding of EOC Continuity of Operations (COOP), succession, emergency procedures, and safety guidelines.	C, E, F, I, T		
6. Participate in the EOC planning process.	E, F, I		
7. Participate in appropriate EOC meetings and briefings related to your assigned function.	E, F, I		
8. Follow general internal and external information flow processes: ✓ Demonstrate knowledge of information management systems, such as incident management software	E, F, I		

DIRECTIONS:

1. Individually, fill out the "EOC PTB Template" to build the EOC PTB for your current or intended EOC resources/logistics position.
2. Remember that the file has a section for instructions.
3. Review the tasks within each skillset.
4. Note which skillsets you would keep.
 - Remember, all EOC positions have the Coordination & Individual Contribution Skillset included in their PTB.
 - If you are using a different tool (like one at your own EOC), you can remove the skillsets, but for this exercise, you will just note which skillsets are a part of the PTB you are building.
5. Add up to 3 additional task(s) in the blank rows under each skillset.
6. Add any applicable documentation to the PTB. Note that the evaluation form is already included in the PDF.
7. You will have 30 minutes to complete this activity.



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Visual 19: Creating a PTB – Step 3a – “We Do Together”

STEP 3a: Using the “Logistics Lead EOC PTB” PDF:

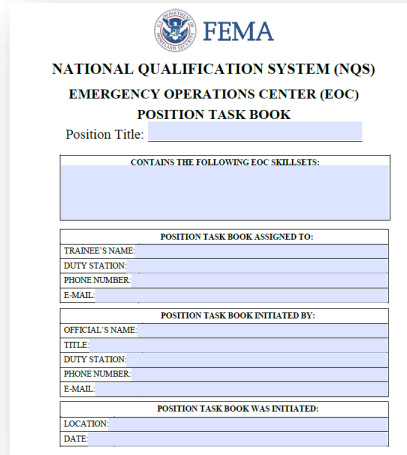
1. Show the filled in “Cover Sheet,” noting:
 - Position Title
 - EOC Skillsets contained in the PTB

 FEMA	
NATIONAL QUALIFICATION SYSTEM (NQS) EMERGENCY OPERATIONS CENTER (EOC) POSITION TASK BOOK	
Position Title: <u>Logistics Lead</u>	
CONTAINS THE FOLLOWING EOC SKILLSETS: Coordination and Individual Contribution, EOC Facility Management, Finance, Resource Ordering and Acquiring, Resource Sourcing, Resource Tracking, Understanding the Resource Requirement	
POSITION TASK BOOK ASSIGNED TO:	
TRAINEE'S NAME: _____ DUTY STATION: _____ PHONE NUMBER: _____ E-MAIL: _____	
POSITION TASK BOOK INITIATED BY:	
OFFICIAL'S NAME: _____ TITLE: _____ DUTY STATION: _____ PHONE NUMBER: _____ E-MAIL: _____	
POSITION TASK BOOK WAS INITIATED:	
LOCATION: _____ DATE: _____	

Visual 20: Individual Activity 9.3: Creating a PTB – Step 3b – “You Do”

Step 3b: Fill in the cover sheet and save the file.

Note that this completed PDF will have your cover sheet, EOC Skillsets and tasks you identified for your role, the evaluation form, and any applicable documentation you may have added.



The image shows a FEMA logo at the top center. Below it, the text reads: "NATIONAL QUALIFICATION SYSTEM (NQS)", "EMERGENCY OPERATIONS CENTER (EOC)", and "POSITION TASK BOOK". There is a field for "Position Title:". Below that is a large blue box labeled "CONTAINS THE FOLLOWING EOC SKILLSETS:". Further down, there are two sections: "POSITION TASK BOOK ASSIGNED TO:" and "POSITION TASK BOOK INITIATED BY:". Each section contains fields for "OFFICIAL'S NAME", "TITLE", "DUTY STATION", "PHONE NUMBER", and "E-MAIL:". At the bottom, there is a section for "POSITION TASK BOOK WAS INITIATED:" with fields for "LOCATION" and "DATE".

DIRECTIONS:



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1. Using the "EOC PTB Template" PDF, fill out the "Cover Sheet" for your current or intended EOC planning position, as demonstrated by the Instructor. This includes:
 - Position Title
 - EOC Skillsets contained in the PTB
2. Save the file as "[Position] EOC PTB" (e.g., Logistics Lead EOC PTB). Note that this completed PDF will have your cover sheet, EOC Skillsets and tasks you identified for your role, the evaluation form, and any applicable documentation you may have added.
3. You will have 10 minutes to complete this activity.

Visual 21: Unit Nine Summary

Congratulations! We have reviewed the following:

- What a Position Task Book (PTB) looks like.
- EOCs use PTBs that align with their EOC Skillsets.
- Creating a PTB for an EOC role.



Unit 10: Review, Final Exercise, and Final Assessment

Visual 1: Unit 10: Review, Final Exercise, and Final Assessment

K2306 EOC Resources Support Skillset Course

Unit 10: Course Review, Final Exercise, and Post-Assessment

Visual 2: Unit 10 Learning Objective

After this Unit, you will be able to:

- Demonstrate knowledge of the resource support responsibilities, documentation, and activities within an EOC.

Visual 3: NIMS Framework and EOC Organizational Structures



Visual 4: Class Discussion

What is NIMS based on, and how does it impact EOCs?



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Share some lessons learned regarding NIMS and how it impacts EOCs.

EOCs enable multiagency coordination by ensuring that response systems are interconnected and complementary. They reinforce interoperability among the various system components and make response more efficient and effective by coordinating available resources.

EOCs serve several main functions within NIMS Command and Coordination:

- Information management—collecting, analyzing, and interpreting information from various sources and sharing essential information
- Resource Management—coordinating support for resource needs and requests
- Planning—coordinating plans and determining current and future needs

EOCs can make decisions based on established policies and procedures within the authority given to them by their jurisdiction.

In some jurisdictions or some specific incidents EOCs may also:

- Manage Operations such as emergency shelters or points of distribution to allow the Incident Command to focus on the incident
- Direct tactical operations when an Incident Command is not established (such as in a snow emergency).

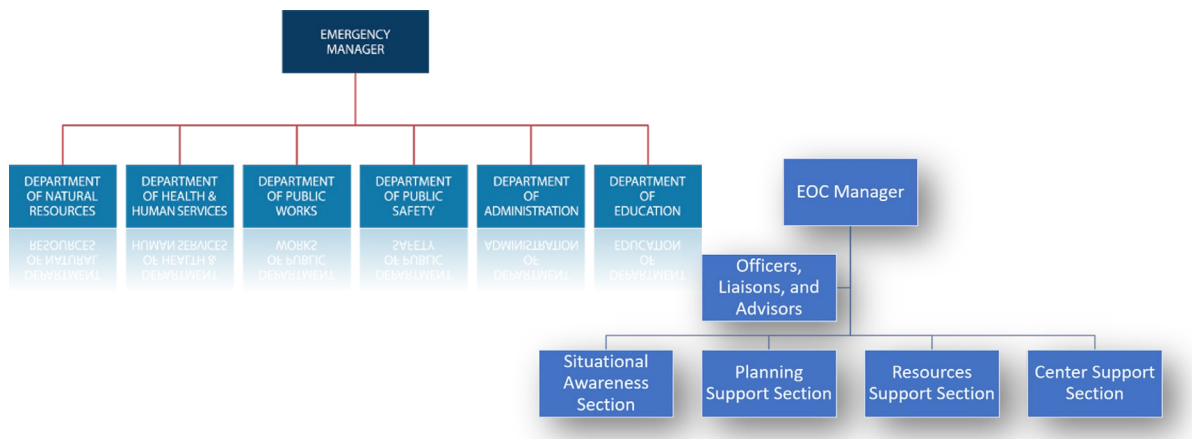


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continue

- Coordinate the efforts of several geographically separated incidents or activities.
- Provide coordination and policy direction.

In some cases, a jurisdiction may conduct incident or Area Command from the EOC.

Visual 5: Class Discussion



1. What two structures are represented here?
2. How would Resource Management differ in between the two structures?

Questions:

1. What two structures are represented on the slide?
2. How would Resource Management differ in between the two structures?

There are many EOC structures. Your EOC's structure is determined by your community or jurisdiction.

Some examples include:



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- The ICS/ICS-like structure mirrors the organization of on-scene personnel.
- It avoids the additional EOC training requirements beyond ICS.
- It supports situations when EOC staff may provide tactical direction to an incident.
- The ISM structure focuses on information, planning, and resource support (support functions). Situational Awareness becomes its own section. ISM combines several functions into a Resource Support section.
- The Departmental structure is just that. The EOC uses a day-to-day departmental/agency structure where the Emergency Manager/Senior Official coordinates the EOC's efforts among departments/agencies.
- Department/agency representative' function with little preparation or startup and can utilize ESFs instead of departments.

Visual 6: Class Discussion

In addition to tasks, what other components are included in an EOC PTB?

How do PTBs enable EOCs to be more efficient and effective when managing resources during an incident and supporting disaster recovery?



Questions

1. In addition to tasks, what other components are included in an EOC PTB?



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2. How does PTBs enable EOCs to be more efficient and effective when managing resources during an incident and supporting disaster recovery?

Visual 7: EOC Facility Management



We discussed an emergency operations center (EOC) is a physical facility or virtual (e.g., telephone conference call) location designed to support:

- Emergency response/recovery
- Continuity of operations – ask are they using COG or COOP what are they using within their EOC?
- Crisis communications activities

EOC personnel meets at the EOC to manage preparations for an impending event or manage the response to an ongoing incident. By gathering the decision makers together and supplying them with the most current information, better decisions can be made.



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Question

What does it take to establish an operational EOC?

Visual 8: EOC Facility Management

There are three (3) task categories that fall under EOC Facility Management:

1. Ensure that EOC infrastructure is operational
2. Support the needs of EOC personnel
3. Ensure security of the EOC



Visual 9: Class Discussion

EOCs must oversee the operational and logistical management of the EOC facility.

How does your EOC meet the three task group criteria outlined in the Facility Management Skillset?



Question:



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EOCs must understand resource options in order to acquire resources to support incident operations. Based on everything that you have learned over the past five days, what steps would you take to determine what resources your jurisdiction currently own?

Visual 10: Understanding the Resource Requirement



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Resource typing is defining and categorizing resources based on:

- Capability
- Resources requested
- Deployed resources
- Used in incidents

Visual 11: Class Discussion

EOCs must gather and understand resource needs in order to communicate resource specifications.

What is a primary purpose for validating the resource requests received by the EOC?



The first task category is:

- Communicate with requestor as necessary to understand mission and resource requirements.
- Apply awareness of the situation to initially validate resource request and anticipate unrequested resource needs.



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The second task category is:

- Communicate requirement in plain language
- Use national standards and common terminology

Partner and collaborate with the requestor to guide them from the beginning of the request to answer the questions to move through the CSALTT concept. It is key to remember that the request must align to the mission. To help ensure this creating a checklist will be helpful. The checklist should help you obtain the information to move through the CSALTT concept. By not understanding the capability or mission can cause a resource to be delayed.

Visual 12: CSALTT Resource Validation



Visual 13: Resource Sourcing



Visual 14: Class Discussion

EOCs must understand resource options in order to acquire resources to support incident operations.

What steps would you take to determine what resources your jurisdiction currently own?



Question:

EOCs must understand resource options in order to acquire resources to support incident operations. Based on everything that you have learned over the past five days, what steps would you take to determine what resources your jurisdiction currently own?



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Visual 15: Resource Ordering and Acquiring

RESOURCE REQUEST MESSAGE (ICS 213 RR)									
1. Incident Name:			2. Date/Time			3. Resource Request Number:			
4. Order (Use additional forms when requesting different resource sources of supply.):									
Requestor	Qty.	Kind	Type	Detailed Item Description: (Vital characteristics, brand, specs, experience, size, etc.)			Arrival Date and Time		Cost
							Requested	Estimated	
5. Requested Delivery/Reporting Location:									
6. Suitable Substitutes and/or Suggested Sources:									
7. Requested by Name/Position:				8. Priority: ☐ Urgent ☐ Routine ☐ Low			9. Section Chief Approval:		
Logistics	10. Logistics Order Number:						11. Supplier Phone/Fax/Email:		
	12. Name of Supplier/POC:								
	13. Notes:								
	14. Approval Signature of Auth Logistics Rep:						15. Date/Time:		
Finance	16. Order placed by (check box): ☐ SPUL ☐ PROC								
	17. Reply/Comments from Finance:								
	18. Finance Section Signature:						19. Date/Time:		

ICS 213 RR, Page 1

Even though different formats may exist, every resource order should contain the following essential elements of information:



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- Incident name
- Order and/or request number (if known or assigned)
- Date and time of order
- Quantity, kind, and type. Include special support needs as appropriate
- Reporting location and contact (specific)
- Requested time of delivery (specific, not simply ASAP)
- Communications system to be used
- Person/title placing request
- Callback phone number for clarification or additional information

Visual 16: Class Discussion

- What question does “Determining resource needs” answer?
- What questions does “Resource ordering” answer?
- What does “Check-in process” mean?
- What does “Evaluating resources” mean?



Questions:

- What question does “Determining resource needs” answer?



Student
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- What questions does “Resource ordering” answer?

- What does “Check-in process” mean?



Student
Manual,
continued

- What does “Evaluating resources” mean?

Visual 17: Finance



Student
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EOCs and jurisdictions respond to various situations using their dedicated, and often limited, emergency management resources and budget. When a large-scale incident or disaster occurs, governments incur significant costs while also facing a potential reduction in revenue. This scenario often results in overspending or reallocating funding across agencies or programs. These financial challenges affect a jurisdiction's ability to operate and may ultimately inhibit its efforts to rebuild and recover.

Visual 18: Class Discussion

EOCs must oversee EOC procurement policies and fiscal management activities.

What core components are you going to look for in your EOC's financial management plan?

What key steps are you going to include to ensure it covers every aspect of reimbursements as it relates to resources?



Questions:

What core components are you going to look for in your EOC's financial management plan?



Student
Manual

What key steps are you going to include to ensure it covers every aspect of reimbursements as it relates to resources?

Visual 19: Resource Tracking



Emergency resource management must take place in the most efficient, expedient, and responsible manner possible. This ensures resources are:



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- Quickly identified
- Accurately ordered and acquired
- Mobilized quickly
- Tracked and reported methodically
- Demobilized efficiently
- Restocked and reimbursed properly

Visual 20: Class Discussion

EOCs must track acquired resources from mobilization through demobilization.

Why is it important to establish resource priorities levels in your EOC?



Question:

Why is it important to establish resource priorities levels in your EOC?



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Visual 21: EOC Resource Support Collaboration and Communication

- Ensuring collaboration in resource management
- ESF organizational method
- Ensuring communication in resource management



Policy/MAC Group



Emergency Operations Center (EOC)



Incident Commander

Question:

What were some of your specific takeaways from the importance of EOC collaboration and communication as it relates to resource management?



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Visual 22: Poll: Share Something You Have Learned in This Course



Visual 23: EOC Resource Support Course Final Activity



Visual 24: Breakout Group: Final Course Activity (2 hours)

1. As a group, review the scenario and instructions.
2. Develop a Resource Management Process for your EOC by completing the questions in the handout.
3. You may use Microsoft Word or PowerPoint to document your responses and put together your process.
4. Have one group member take notes and a different group member present a part of your group's EOC Resource Management Process to the class.



DVIDS image by George Armstrong

Activity



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1. As a group, review the scenario and instructions.
2. Develop a Resource Management Process for your EOC by completing the questions in the handout.
3. You may use Microsoft Word or PowerPoint to document your responses and put together your process.
4. Have one group member take notes and a different group member present a part of your group's EOC Resource Management Process to the class.

Visual 25: State Code Map

Alabama – 02	Kentucky – 21	Oregon – 41
Alaska – 01	Louisiana – 22	Other – 58
American Samoa – 04	Maine – 25	Pennsylvania – 42
Arizona – 05	Maryland – 24	Puerto Rico – 43
Arkansas – 03	Massachusetts – 23	Rhode Island – 44
California – 06	Michigan – 26	South Carolina – 45
Canal Zone – 09	Minnesota – 27	South Dakota – 46
Colorado – 07	Mississippi – 29	Tennessee – 47
Connecticut – 08	Missouri – 28	Texas – 49
Delaware – 11	Montana – 30	U.S. Trust Territories – 48
District of Columbia – 10	Nebraska – 33	Utah – 50
Florida – 12	Nevada – 37	Vermont – 53
Georgia – 13	New Hampshire – 34	Virgin Islands – 52
Guam – 14	New Jersey – 35	Virginia – 51
Hawaii – 15	New Mexico – 36	Washington – 54
Idaho – 17	New York – 38	West Virginia – 56
Illinois – 18	North Carolina – 31	Wisconsin – 55
Indiana – 19	North Dakota – 32	Wyoming – 57
Iowa – 16	Ohio – 39	
Kansas – 20	Oklahoma – 40	

Visual 26: Post-Assessment (20 minutes)

To complete the post-assessment, do the following:

- Access the link to take the post-assessment.
- Log off from the course, once completed.

