
UNIT 6: PROCURING AND MANAGING RESOURCES

In this unit you will learn about:

- **Identifying Physical Resource Needs.** The physical resources that a typical CERT program will need, where to find them, and what they might cost.
- **Managing Data.** What data needs to be collected and how to track it.
- **Budgeting and Funding.** What to include in a budget. Where to find funding to cover the budget.

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LEARNING OBJECTIVES/ PERFORMANCE OUTCOMES

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

- Establish a process for acquiring and managing program resources.
 - Identify types of resources needed to coordinate a CERT program.
 - Identify types of data that need to be collected and maintained for the program.
 - Develop strategies for locating and managing resources.
 - Identify program funding options and tips for approaching funders.
 - Develop a draft program budget.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- Identifying Physical Resource Needs
- Managing Data
- Budgeting and Funding
- Unit Summary

ESTIMATED COMPLETION TIME

1.5 hours

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TRAINING METHODS

The instructor begins by explaining that during most of the first hour participants will work in four small groups. Each group will be given a CERT program scenario and will identify what physical (people, equipment, materials, supplies, facilities) resources are needed, where to locate those resources, and the per-unit cost of the resources.

During the three-part activity, the instructor will review some particular issues: the importance of being thorough in identifying the resources needed, instructor costs, and the need to consider storage issues.

Participants will then enter into their Draft Program Plan management ideas they want to think about when procuring resources.

Managing data is discussed next. The instructor will conduct a guided discussion of the types of data to collect. The instructor will review the operational, administrative, and political reasons for keeping good, accessible records and will address ways to reduce liability. Finally the instructor and class discuss recordkeeping tips.

Participants will then enter into their Draft Program Plan data collection and recordkeeping things they need to do.

The final topic is budgeting and funding. The instructor reviews the process for developing a budget, shows a sample budget, and points participants to the resources on the CERT Web site. Then the instructor and class discuss several funding sources and review how to approach a funder.

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
 - *Community Emergency Response Team Program Manager Participant Manual* (for participants)
 - PowerPoint slides 6-1 to 6-34
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- EQUIPMENT** The following equipment is required for this unit:
- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers
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NOTES A suggested time plan for this unit is as follows:

Unit Overview1 minute

Identifying Physical Resource Needs53 minutes

Draft Program Plan: Identify Physical Resource Procurement Factors to Consider5 minutes

Managing Data 15 minutes

Draft Program Plan: Record Data Collection and Recordkeeping Ideas.....5 minutes

Budgeting and Funding 10 minutes

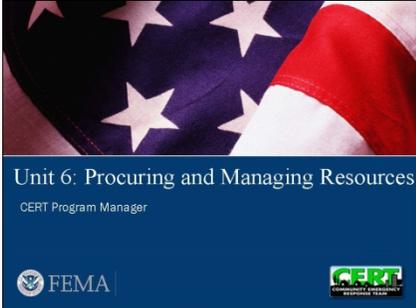
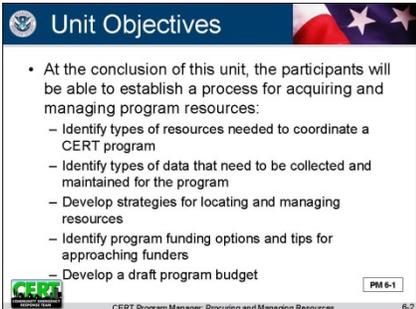
Unit Summary1 minute

Total Time: 1.5 hours

REMARKS The first section of this unit focuses on identifying, locating, and costing physical resources. Four small groups are each given a scenario and develop a plan based on that scenario. Since the scenarios are ones that all Program Managers will grapple with, the small groups will be asked to turn in their plans at the end of the unit so copies can be made for all participants.

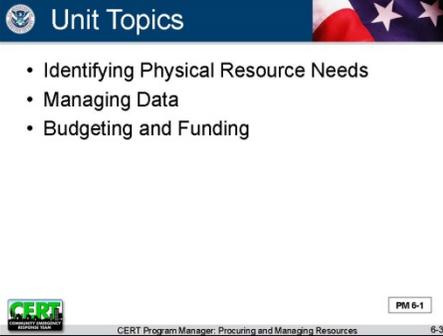
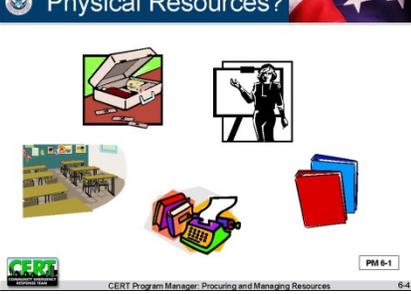
Plan to make the copies during the evening of the first day of training and return the copies on the second day. You will need to make one copy of each scenario for each participant.

Unit 6: Procuring and Managing Resources

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit 6: Procuring and Managing Resources CERT Program Manager</p> <p>FEMA CERT</p> <p>Display Slide 6-1</p>  <p>Unit Objectives</p> <ul style="list-style-type: none"> At the conclusion of this unit, the participants will be able to establish a process for acquiring and managing program resources: <ul style="list-style-type: none"> Identify types of resources needed to coordinate a CERT program Identify types of data that need to be collected and maintained for the program Develop strategies for locating and managing resources Identify program funding options and tips for approaching funders Develop a draft program budget <p>CERT PM 6-1</p> <p>Display Slide 6-2</p>	<p>Unit Overview</p> <p>Say that starting a CERT program requires physical resources – personnel, equipment, and materials – and some type of program funding. This unit looks at how to procure and manage those resources. It also looks at how to manage the data associated with those resources.</p> <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to establish a process for acquiring and managing program resources:</p> <ul style="list-style-type: none"> Identify types of resources needed to coordinate a CERT program. Identify types of data that need to be collected and maintained for the program. Develop strategies for locating and managing resources. Identify program funding options and tips for approaching funders. Develop a draft program budget.

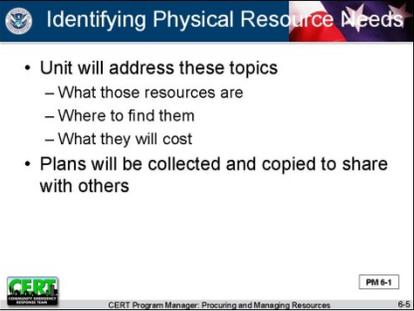
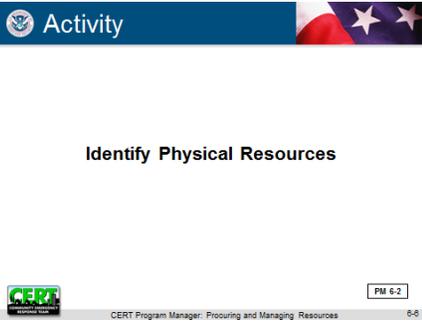
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UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• Identifying Physical Resource Needs• Managing Data• Budgeting and Funding <p><small>CERT CERT Program Manager: Procuring and Managing Resources PM 6-1 6-3</small></p> <p>Display Slide 6-3</p>	<p>Unit Topics</p> <p>Say that, given the nature of the training that CERT provides and the work that CERTs do, running a CERT program is resource intensive. Therefore it is important to know what resources are needed and where to find them, what data to gather and how to track it, and how to develop a budget and get it funded.</p> <p>Say that this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ Identifying Physical Resource Needs▪ Managing Data▪ Budgeting and Funding
 <p>Physical Resources?</p> <p><small>CERT CERT Program Manager: Procuring and Managing Resources PM 6-1 6-4</small></p> <p>Display Slide 6-4</p>	<p><i>Identifying Physical Resource Needs</i></p> <p>Explain that CERT programs have lots of physical resource needs. By physical resources we are talking about:</p> <ul style="list-style-type: none">▪ Training supplies▪ Instructors▪ Office equipment▪ Training facility▪ Printed materials▪ Etc. <p>Explain physical resources include everything EXCEPT data and funding.</p> <p>Emphasize this point.</p>

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INSTRUCTOR GUIDANCE	CONTENT
 <p>Identifying Physical Resource Needs</p> <ul style="list-style-type: none">• Unit will address these topics<ul style="list-style-type: none">– What those resources are– Where to find them– What they will cost• Plans will be collected and copied to share with others <p>CERT CERT Program Manager: Procuring and Managing Resources 6-5</p> <p>Display Slide 6-5</p>  <p>Activity</p> <p>Identify Physical Resources</p> <p>CERT CERT Program Manager: Procuring and Managing Resources 6-6</p> <p>Display Slide 6-6 PM, P. 6-3 to 6-6</p>	<p>Explain that, during the first hour of training participants are going to work in small groups to figure out just what those resources are, where to find them, and their per-unit cost.</p> <p>Tell participants that at the end of the unit the plans will be collected and copied so everyone has the benefit of each other's work.</p> <p>Activity: Identify Physical Resources</p> <p>Purpose: This activity allows participants to identify what resources they would need for a particular scenario.</p> <p>Instructions: Follow the steps below to conduct the activity.</p> <ol style="list-style-type: none">1. Divide the class into four small groups. Include at least one experienced Program Manager in each group.2. Refer participants to <i>Procuring and Managing Program Resources</i> in the Participant Manual and on the following pages in the Instructor Guide.3. Assign a different scenario to each small group.4. Review the instructions:<ol style="list-style-type: none">a. For Our assignment, fill in the underlined text of the scenario assigned to you.b. For We made these assumptions: As you complete the full exercise, you may find that there are assumptions you are making about how you would implement the scenario. Those assumptions should be entered in this area.<ol style="list-style-type: none">i. Example for Scenario #2: "We assume that the course will last 21 hours."ii. One assumption has been entered: That you will have adequate funding to complete the task.

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INSTRUCTOR GUIDANCE	CONTENT
<p>This is a progressive activity. Emphasize that participants should only complete the assigned parts of the worksheet.</p>	<ul style="list-style-type: none">c. Complete the first column ONLY of the table on the second page, What Resources Do We Need? Think about the scenario and ask what resources are needed to complete the activity. Be sure to be very thorough in identifying your resources. Use extra pages if needed.d. NOTE: DO NOT fill out the second or third columns in the table on resources at this time.e. You have 10 minutes.f. You will report your list to the whole group. <p>Debrief:</p> <ul style="list-style-type: none">1. Ask each group to state its scenario and then to list the resources the group identified that they would need.2. Ask other groups to add anything that was missed.3. If funding is raised as a concern, acknowledge that no plan is ever developed without budget concerns being one of the factors. However, for this activity try to set aside funding questions.4. Ask if any groups made assumptions. If so, ask for some examples.

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PM, P. 6-3 to 6-6	Procuring and Managing Program Resources
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Scenarios

1. You are setting up a CERT program office with one full-time person. You also hope to have a part-time administrative person but you are not sure how to fund this position.
2. You need to organize a CERT Basic Training course. You hope to have 25 people attend the course.
3. You need to provide regular communications to CERT volunteers, instructors, and program supporters. You have decided to have a newsletter and a Web site.
4. You are arranging the annual CERT training exercise. You expect to have 40 volunteers attend.

Our assignment: _____ (enter the underlined text for the scenario)

We made these assumptions: (As needed, add to the list throughout the activity.)

1. We will have adequate funding to complete the task.

2. _____

3. _____

4. _____

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5.

6.

7.

8.

9.

10.

What Resources Do We Need?	Where/How Will We Get Them?	What Will They Cost?

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We need to collect and track this information:

1.

2.

3.

4.

5.

6.

7.

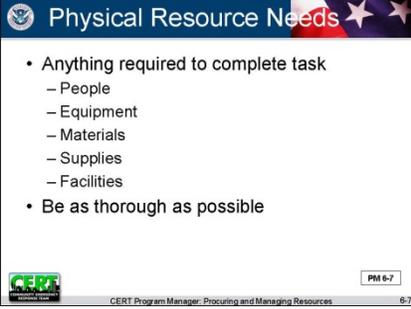
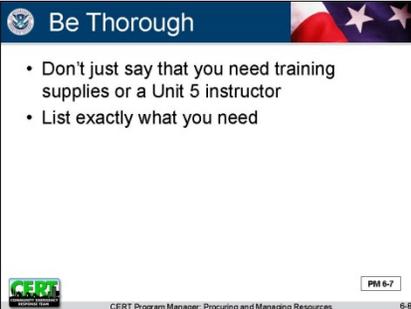
8.

9.

10.

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INSTRUCTOR GUIDANCE	CONTENT
 <p>Physical Resource Needs</p> <ul style="list-style-type: none">• Anything required to complete task<ul style="list-style-type: none">– People– Equipment– Materials– Supplies– Facilities• Be as thorough as possible <p><small>CERT Program Manager: Procuring and Managing Resources 6-7</small></p> <p>Display Slide 6-7</p>  <p>Be Thorough</p> <ul style="list-style-type: none">• Don't just say that you need training supplies or a Unit 5 instructor• List exactly what you need <p><small>CERT Program Manager: Procuring and Managing Resources 6-8</small></p> <p>Display Slide 6-8</p>	<p>After all groups have reported out, summarize by saying that resources include anything that will be needed to complete the task:</p> <ul style="list-style-type: none">▪ People▪ Equipment▪ Materials▪ Supplies▪ Facilities <p>Remind participants to be as thorough as possible when identifying resources.</p> <p>For example: Don't just state that you need training supplies or a Unit 5 instructor. List exactly what you need.</p>

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INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 6-9</p> <p>Conduct a class discussion by asking this question.</p> <p><i>This slide is animated. The first click displays the question. The second click displays the responses.</i></p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask participants:</p> <p>What things do you need to have in a good training facility?</p> <p>Summarize the discussion by listing essentials for a good training facility:</p> <ul style="list-style-type: none">▪ Easy to find▪ Disability access▪ Parking▪ Bathrooms▪ Good lighting and heating/AC▪ Contact names for AV support, facility support▪ Chairs and tables▪ Easels and easel pads or whiteboard▪ Computer and projection system▪ Space for hands-on exercises▪ Space for burning▪ Burn permit▪ Backup location <p>Remind participants that you need all of this in a backup location too.</p>

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INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 352 613 394"> Activity</p> <p data-bbox="321 489 483 510">Locate Resources</p> <p data-bbox="191 632 613 674"> <small>CERT Program Manager: Procuring and Managing Resources 6-10</small></p> <p data-bbox="191 684 459 716">Display Slide 6-10</p>	<p data-bbox="634 352 1040 384">Activity: Locate Resources</p> <p data-bbox="634 405 1438 510">Purpose: This activity allows participants to identify where or how they would get the resources they need for their scenario.</p> <p data-bbox="634 531 1365 594">Instructions: Follow the steps below to conduct the activity.</p> <ol data-bbox="634 615 1438 951" style="list-style-type: none">1. Review the instructions:<ol data-bbox="691 674 1438 951" style="list-style-type: none">a. In the same small groups, add resources to their lists if the previous discussion stimulated ideas.b. Complete the second column ONLY of the table on the second page, Where/How Will We Get Them? Be creative in thinking about your options.c. You have 10 minutes. <p data-bbox="634 993 756 1024">Debrief:</p> <ol data-bbox="634 1045 1438 1602" style="list-style-type: none">1. Ask each group what decision they made about finding resources.<ol data-bbox="667 1136 1138 1325" style="list-style-type: none">a. Did they have to pay for it?b. Could they borrow or share it?c. Could they scavenge it?d. Could they swap it for something else?2. Ask other groups to add further ideas. For example: get an administrative assistant from Senior Corps or AmeriCorps.3. Remember that most CERT programs are not started in complete isolation. Your affiliation with your sponsor will undoubtedly give you access to some resources.

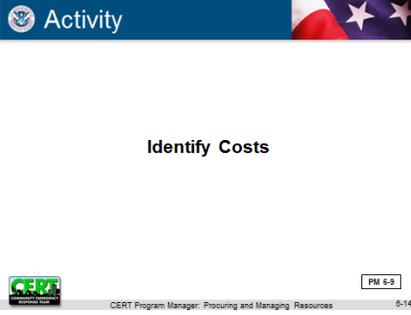
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INSTRUCTOR GUIDANCE	CONTENT
 <p>What Do You Think?</p> <ul style="list-style-type: none">• Did anyone talk about needing to store a resource? <p>PM 6-8</p> <p>CERT Program Manager: Procuring and Managing Resources 6-11</p>	<p>Ask participants:</p> <p>Did anyone talk about needing to store a resource?</p>
<p>Display Slide 6-11</p>  <p>Storage</p> <ul style="list-style-type: none">• What might need to be stored? Where would you store it?<ul style="list-style-type: none">– What to store<ul style="list-style-type: none">• Training equipment• Materials for CERT kits– Storage considerations<ul style="list-style-type: none">• Needs to be at or close to training facility– Storage options<ul style="list-style-type: none">• Get it free• Use a trailer– Keep list of inventory in storage <p>PM 6-8</p> <p>CERT Program Manager: Procuring and Managing Resources 6-12</p>	<p>Ask participants:</p> <p>What might need to be stored? Where would you store it?</p> <p>Summarize the discussion about storage:</p> <ul style="list-style-type: none">▪ What to store<ul style="list-style-type: none">• Training equipment• Materials for CERT members' kits▪ Storage considerations<ul style="list-style-type: none">• Needs to be at or close to the training facility▪ Storage options<ul style="list-style-type: none">• Get it free: public building, church, school, partner program• Use a trailer: Make sure to license it; have a secure place to park it; have a vehicle to pull it.▪ Keep a list of the inventory in storage.
<p>Display Slide 6-12</p> <p>Conduct a class discussion by asking this question.</p> <p><i>This slide is animated. The first click displays the question. The second click displays the responses.</i></p> <p>Before moving on, ask the participants if they have any questions.</p>	

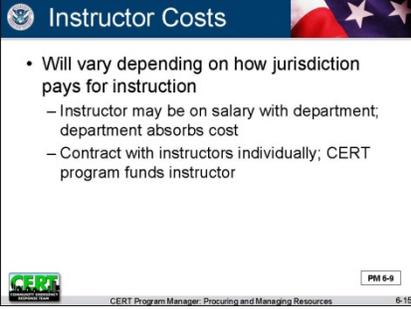
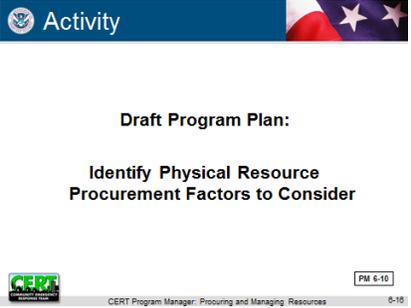
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INSTRUCTOR GUIDANCE	CONTENT
 <p>Storage (cont'd)</p> <p>CERT Program Manager: Procuring and Managing Resources 6-13</p>	<p>Explain that this is a picture of one CERT program's storage trailer.</p>
<p>Display Slide 6-13</p>  <p>Activity</p> <p>Identify Costs</p> <p>CERT Program Manager: Procuring and Managing Resources 6-14</p>	<p>Activity: Identify Costs</p> <p>Purpose: This activity allows participants to identify a per-unit cost for their resources.</p> <p>Instructions: Follow the steps below to conduct the activity.</p> <ol style="list-style-type: none">1. Review the instructions:<ol style="list-style-type: none">a. Add storage to your resources if you need it for your scenario. Also add something to the second column about what you will use for storage, e.g., training facility space, donated space, a trailer.b. In the same small groups, complete the third column of the table on the second page, What Will They Cost?c. Enter a per-unit cost, e.g., per hour, per pencil. Don't worry about knowing actual costs. For now, just estimate.d. If there is no cost, enter "0."e. You have 10 minutes.
<p>Display Slide 6-14</p>	<p>Debrief:</p> <ol style="list-style-type: none">1. Ask if anyone had difficulty even estimating a cost. Discuss as a group.2. Remind participants that, when conducting this process in real time, they will have to research costs to get an actual amount.

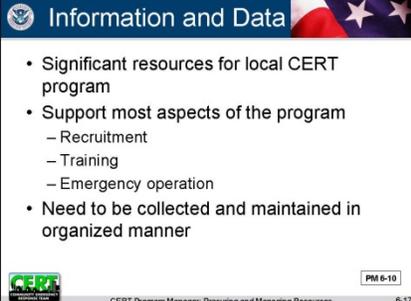
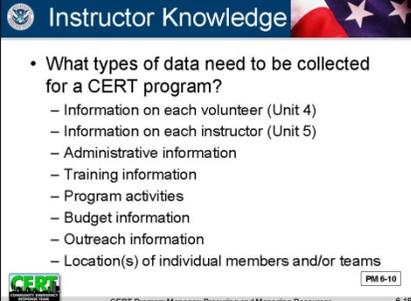
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INSTRUCTOR GUIDANCE	CONTENT
 <p>Instructor Costs</p> <ul style="list-style-type: none">• Will vary depending on how jurisdiction pays for instruction<ul style="list-style-type: none">– Instructor may be on salary with department; department absorbs cost– Contract with instructors individually; CERT program funds instructor <p>Display Slide 6-15</p>  <p>Activity</p> <p>Draft Program Plan:</p> <p>Identify Physical Resource Procurement Factors to Consider</p> <p>Display Slide 6-16</p> <p>If you are short on time, point out this section and ask participants to complete it on their own.</p> 	<p>Discuss instructor costs. Depending on how the jurisdiction pays for instruction, the costs for holding the <i>CERT Basic Training</i> course and other training may vary.</p> <ul style="list-style-type: none">▪ Some departments have instructors on salary and will absorb the cost into their annual budget.▪ Others have to contract with instructors individually and the CERT program will have to fund the instructor. <p>Explain that this section has addressed procuring and managing resources. You probably have some ideas that you want to remember.</p> <p>Activity: Draft Program Plan: Identify Physical Resource Procurement Factors to Consider</p> <p>Purpose: This activity allows Program Managers to record factors they might need to consider when procuring resources.</p> <p>Instructions: Follow the steps below to conduct the activity.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the first table of the sixth section, <i>Procuring and Managing Resources</i>, individually. The table title is “When procuring program resources, I need to think about these management issues.” <p>Before moving on to talk about managing data, are there any questions about what resources are needed, where to find them, and how to cost them?</p>

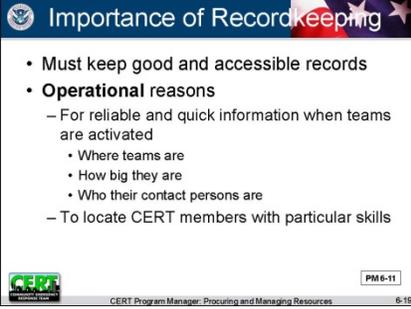
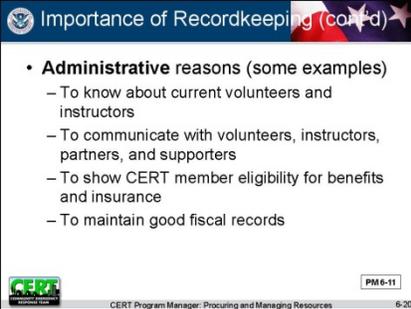
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INSTRUCTOR GUIDANCE	CONTENT
 <p>Information and Data</p> <ul style="list-style-type: none">• Significant resources for local CERT program• Support most aspects of the program<ul style="list-style-type: none">– Recruitment– Training– Emergency operation• Need to be collected and maintained in organized manner <p><small>CERT Program Manager: Procuring and Managing Resources 6-17</small></p>	<h3>Managing Data</h3> <p>Explain that the group has spent the past hour talking about physical resources – people, equipment, materials, supplies, facilities. Another resource that a CERT program has is information. Good data and information are essential support for almost all aspects of the program. That information needs to be collected and maintained in an organized manner.</p>
<p>Display Slide 6-17</p>  <p>Instructor Knowledge</p> <ul style="list-style-type: none">• What types of data need to be collected for a CERT program?<ul style="list-style-type: none">– Information on each volunteer (Unit 4)– Information on each instructor (Unit 5)– Administrative information– Training information– Program activities– Budget information– Outreach information– Location(s) of individual members and/or teams <p><small>CERT Program Manager: Procuring and Managing Resources 6-18</small></p>	<h3>Types of Data to Collect</h3> <p>Ask participants:</p> <p>What types of data need to be collected for a CERT program?</p> <p>Summarize the discussion by listing the types of data that need to be collected:</p> <ul style="list-style-type: none">▪ Information on each volunteer (discussed in Unit 4)▪ Information on each instructor (discussed in Unit 5)▪ Administrative information, e.g., inventory▪ Training information, e.g., rosters, evaluations▪ Program activities, e.g., requests for CERT activation (disaster and non-disaster), presentations made▪ Budget information, e.g., income, expenses, periodic reports▪ Outreach information, e.g., marketing contacts, mailing lists, potential volunteers▪ Location(s) of individual members and/or teams to facilitate activation
<p>Display Slide 6-18</p> <p>Conduct a class discussion by asking this question. Record the responses on the easel pad.</p> <p><i>This slide is animated. The first click displays the question. The second click displays the responses.</i></p> <p>Before moving on, ask the participants if they have any questions.</p>	

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INSTRUCTOR GUIDANCE	CONTENT
 <p>• Must keep good and accessible records</p> <ul style="list-style-type: none">• Operational reasons<ul style="list-style-type: none">– For reliable and quick information when teams are activated<ul style="list-style-type: none">• Where teams are• How big they are• Who their contact persons are– To locate CERT members with particular skills <p>Display Slide 6-19</p>  <p>• Administrative reasons (some examples)</p> <ul style="list-style-type: none">– To know about current volunteers and instructors– To communicate with volunteers, instructors, partners, and supporters– To show CERT member eligibility for benefits and insurance– To maintain good fiscal records <p>Display Slide 6-20</p>	<h3>Importance of Recordkeeping</h3> <p>Explain that maintaining records is an important part of a CERT program. There are operational, administrative, and political reasons to keep good and accessible records.</p> <ul style="list-style-type: none">▪ Operational<ul style="list-style-type: none">• During emergency operations, the teams may self-activate.• However, if the sponsoring agency needs to activate the teams, the CERT program will need reliable and quick information – where the teams are, how big they are, who their contact persons are.• If particular skills are needed, the Program Manager needs to be able to locate people with those skills.▪ Administrative<ul style="list-style-type: none">• The CERT program needs to keep track of volunteers and instructors, e.g., how many people have completed the <i>CERT Basic Training</i>, up-to-date contact info, which instructors can teach which units, and advanced training CERT members may have taken. (See Units 4 and 5)• The CERT program needs to stay in touch with current and former volunteers and instructors, as well as with program partners and supporters.• Keeping records allows CERT members to be eligible for benefits and insurance if these are available to the State’s volunteer emergency workers.• The CERT program needs to maintain good fiscal records for legal and budgetary reasons.

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INSTRUCTOR GUIDANCE	CONTENT
<p>Importance of Recordkeeping (cont'd)</p> <ul style="list-style-type: none">• Political reasons (some examples)<ul style="list-style-type: none">– To generate statistics– To prove value of program  <p>CERT Program Manager: Procuring and Managing Resources 6-21</p>	<ul style="list-style-type: none">▪ Political<ul style="list-style-type: none">• Recordkeeping is necessary to generate statistical information for interested parties, such as elected officials, about the number of participants in different parts of the city and the growth of the program.
<p>Display Slide 6-21</p>	
<p>Reduce Liability</p> <ul style="list-style-type: none">• Ways to reduce liability<ul style="list-style-type: none">– Provide training in how to respond safely and effectively in an emergency– Maintain accurate and complete records so that you can document what you have done• Visit CERT Web site to learn more  <p>CERT Program Manager: Procuring and Managing Resources 6-22</p>	<p>Reducing Liability</p> <p>Say that some of the most frequently asked questions about CERT programs concern liability and how to manage the liability for the CERT program.</p> <ul style="list-style-type: none">▪ Providing training in how to respond safely and effectively in an emergency is one way that a CERT program addresses liability and prepares CERT members.▪ Another way is to maintain accurate and complete records so that the Program Manager can document what the program has done. Good recordkeeping is an important part of risk management.
<p>Display Slide 6-22</p>	
<p>Recordkeeping Tips</p> <ul style="list-style-type: none">• Set up a good system early; keep current• Only keep data critical to program<ul style="list-style-type: none">– Consult your attorney for what to track and what not to track• Safeguard personal information<ul style="list-style-type: none">– Get permission to share information• Don't reinvent the wheel<ul style="list-style-type: none">– CERT Web site– Other Program Managers  <p>CERT Program Manager: Procuring and Managing Resources 6-23</p>	<p>Tell participants that there is information on the CERT Web site about reducing liability. Be sure to read it. www.fema.gov/cert.</p> <p>Recordkeeping Tips</p> <p>Provide these tips to participants:</p> <ul style="list-style-type: none">▪ Set up a good recordkeeping system as soon as possible. Keep it current. It will make the job easier.▪ Only keep data critical to the program. Consult the sponsoring agency's legal counsel (e.g., city attorney) to see for what to track and what not to track.▪ Safeguard personal information. Get permission from each volunteer before sharing information with anyone, even other volunteers.
<p>Display Slide 6-23</p>	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
PM, P. 6-13	<ul style="list-style-type: none">▪ Don't reinvent the wheel. There are many sample forms to use as a starting point.<ul style="list-style-type: none">• Check out the CERT Web site. www.fema.gov/cert• Ask other Program Managers for copies of the forms they use. <p>Refer participants to <i>Maintaining CERT Records</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Review it with participants. It provides some additional information and tips on maintaining records.</p>

PM, P. 6-13	Maintaining CERT Records
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Maintaining records can be tedious, but without proper recordkeeping you will quickly fall behind and lose track of your program. Here are some tips:

Identify your information needs and develop your forms from the start. Begin by identifying the potential information requests you will receive as a CERT Program Manager. Then design your recordkeeping forms to meet your information needs before your program begins. Next, consider how you will track and organize the information you are collecting. And finally, design simple formats for reporting CERT accomplishments.

Collect only the data you need. Some personal information, such as home telephone and Social Security numbers, are protected from release by the Privacy Act. Some States protect driver's license numbers and other information. Release of protected information requires the consent of each individual. The safer approach to protecting information is to not collect it unless you really need it.

Keep your database simple and backed up. Add information only as you need to. If your database is computerized, back up the database frequently. Keep these backup copies in a safe place (e.g., store the backups at a different location).

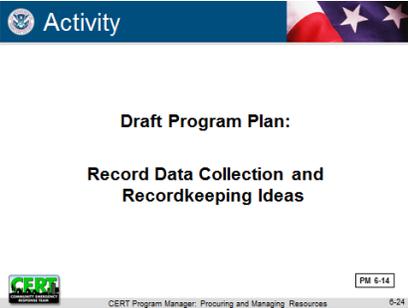
Don't bury yourself in records. Don't maintain data you won't need or won't use. Think carefully about what you really want to record before developing your forms.

Test the forms with your first class. Provide the forms to your first class to ensure that they record the information you need and the forms work the way you want them to work.

Set aside time for record maintenance. Don't let recordkeeping get ahead of you. Set aside time every day or every week to input data. Develop a plan for archiving or destroying old records.

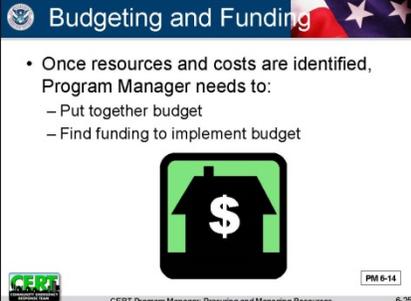
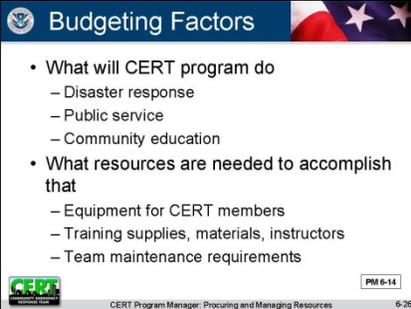
Be careful about sharing data. Sharing forms is one thing, but sharing personal data may be unlawful. If you use a computerized database, it should be password protected.

Enlist some help. If you don't have an administrative assistant assigned to the program, try to enlist one of the CERT graduates to help you. CERT graduates are doing much more than response. In many communities, graduates are coordinating newsletter development, coordinating Web sites, maintaining equipment, and many other jobs. Why not recordkeeping?

INSTRUCTOR GUIDANCE	CONTENT
 <p>This discussion could get lengthy. Watch your time. Focus on gathering tips. If necessary, encourage people to continue the conversation at breaks.</p> <p>Ask each small group to turn in one copy of its plan at the end of the unit.</p>  <p>Display Slide 6-24</p> <p>If you are short on time, point out this section and ask participants to complete it on their own.</p>	<p>Do experienced Program Managers have any additional tips about data management and recordkeeping?</p> <p>Activity: Draft Program Plan: Record Data Collection and Recordkeeping Ideas</p> <p>Purpose: This activity allows Program Managers to record data collection and recordkeeping things they want to make sure to do.</p> <p>Instructions: Follow the steps below to conduct the activity.</p> <ol style="list-style-type: none"> 1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. 2. Ask participants to complete the list in the sixth section, <i>Procuring and Managing Resources</i>, individually. The list title is “Some data collection and recordkeeping things I need to do.”

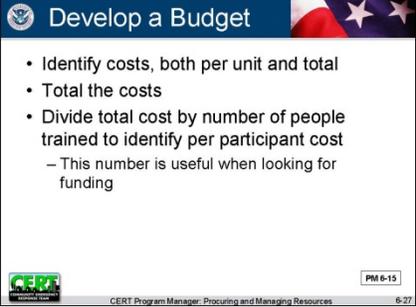
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Budgeting and Funding</p> <ul style="list-style-type: none">Once resources and costs are identified, Program Manager needs to:<ul style="list-style-type: none">Put together budgetFind funding to implement budget  <p><small>CERT Program Manager: Procuring and Managing Resources 6-25</small></p>	<h3><i>Budgeting and Funding</i></h3> <p>Explain that, as participants have seen, a CERT program requires a lot of resources and it is unlikely that all of them can be donated. A Program Manager needs to put together a budget and find funding to implement the budget.</p>
<p>Display Slide 6-25</p>  <p>Budgeting Factors</p> <ul style="list-style-type: none">What will CERT program do<ul style="list-style-type: none">Disaster responsePublic serviceCommunity educationWhat resources are needed to accomplish that<ul style="list-style-type: none">Equipment for CERT membersTraining supplies, materials, instructorsTeam maintenance requirements <p><small>CERT Program Manager: Procuring and Managing Resources 6-26</small></p>	<h3>Budgeting</h3> <p>Say that how much funding is required to start and maintain a CERT program will be determined by:</p> <ul style="list-style-type: none">What the CERT program wants to accomplishWhat resources are needed to accomplish them <h4>What does the CERT program want to do?</h4> <ul style="list-style-type: none">Determine the number of CERT members that will be trained, initially, then on an annual basis.Determine the role that CERT members will play in the community.<ul style="list-style-type: none">CERT members that have functions that are not covered in the <i>CERT Basic Training</i> curriculum will require additional training and supplies.
<p>Display Slide 6-26</p>	<h4>What resources are needed?</h4> <ul style="list-style-type: none">Equipment that the CERT program will supply to each team (e.g., hardhat, vest, ID, gloves, goggles, medical kits)Costs for instructors, training facilities, and equipmentCosts for supplemental training, exercises, and team maintenance activities <p>Say that, after the Program Manager has answered these and other questions about the costs involved, the Program Manager will need to develop a budget.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Develop a Budget</p> <ul style="list-style-type: none">• Identify costs, both per unit and total• Total the costs• Divide total cost by number of people trained to identify per participant cost<ul style="list-style-type: none">– This number is useful when looking for funding <p>Display Slide 6-27</p> <p>PM, P. 6-16</p>	<p>Say that developing a budget is a fairly straightforward activity.</p> <ul style="list-style-type: none">▪ Identify the costs, both per unit and total.▪ Total the costs.▪ Divide the total cost by the number of people trained to identify a per participant cost.<ul style="list-style-type: none">• Knowing this cost will be useful as a Program Manager works to justify the program.• For example: “For \$127 each, the CERT program ensures that 300 more people each year are prepared for a disaster and, for a period of 72 hours, can relieve the first responders by taking care of themselves and their families and assisting those who live or work around them.” <p>Refer participants to the sample budget in the Participant Manual and on the following page in the Instructor Guide.</p> <p>Explain that the budget is a sample of what a CERT budget might look like for the <i>CERT Basic Training</i> course only. Note that this budget is simplified, and a real program budget will be more complex than the budget shown.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

PM, P. 6-16	Sample Annual Budget
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Sample Annualized Costs

Halftime Coordinator	\$24,000
Overtime for instructors (firefighters)	6,000
Miscellaneous supplies	2,750
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	\$32,750

Sample Costs Per Student

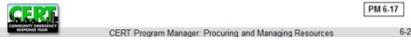
Helmet, vest & badge	16
Training manual	12
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X 100 graduates @ \$28 ea.	\$ 2,800

Total Sample Program Costs **\$35,550**

Total Sample Program Cost/CERT Member	\$355
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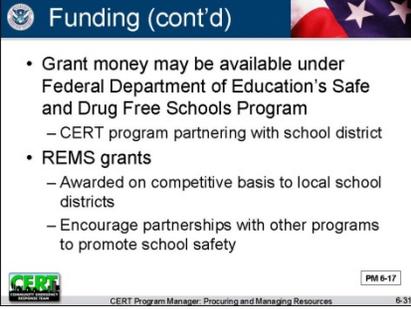
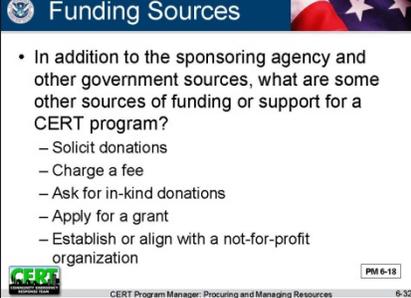
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <ul style="list-style-type: none">• One companion document<ul style="list-style-type: none">– CERT Program Costs Worksheet• Document is primarily for putting on <i>CERT Basic Training</i> course and not for a broader program• Can be expanded for any CERT program configuration• Also link to access Excel Spreadsheet version of CERT Program Costs Worksheet tool  <p>Display Slide 6-28</p>	<p>Tell participants that on the CERT Web site participants can find the following companion document:</p> <ul style="list-style-type: none">▪ CERT Program Costs Worksheet http://www.fema.gov/media-library/assets/documents/28046 <p>Say that this document is primarily for putting on a <i>CERT Basic Training</i> course and not for a broader program. However, it can be expanded for any CERT program configuration.</p> <p>There is also a link to access an Excel Spreadsheet version of the CERT Program Costs Worksheet tool.</p>
 <ul style="list-style-type: none">• All local CERT programs must be recognized by or acknowledged by a local government agency in their area<ul style="list-style-type: none">– Usually fire department or police• Local Program Manager should be affiliated with sponsoring agency• Sponsoring is not the same as funding  <p>Display Slide 6-29</p>	<h3>Funding</h3> <p>Say that all local CERT programs must be recognized by or acknowledged by a local government agency in their area. That agency is usually a fire department or police department.</p> <p>The local Program Manager should be affiliated with the sponsoring agency.</p>
 <ul style="list-style-type: none">• Many local governments use Federal grant funding to support local CERT program, in addition to local funding<ul style="list-style-type: none">– Only governmental agencies may receive Federal funding that supports CERT• Most funding comes through States<ul style="list-style-type: none">– In some metropolitan areas it is through Urban Area Security Initiative (UASI) region  <p>Display Slide 6-30</p>	<p>Explain that just because a government agency sponsors the CERT program does not mean that the agency will provide all the funding for the CERT program. In fact, it probably will not.</p> <ul style="list-style-type: none">▪ Many local governments that sponsor or operate a CERT program provide some local funding but most also use some Federal grant funding to support it.▪ Only governmental agencies may receive the Department of Homeland Security funding that supports CERT. Most of this funding comes through the States or, in some metropolitan areas, through the Urban Area Security Initiative (UASI) region. For more information, contact your State Office of Emergency Management/Homeland Security, or visit www.fema.gov/grants.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Funding (cont'd)</p> <ul style="list-style-type: none">• Grant money may be available under Federal Department of Education's Safe and Drug Free Schools Program<ul style="list-style-type: none">– CERT program partnering with school district• REMS grants<ul style="list-style-type: none">– Awarded on competitive basis to local school districts– Encourage partnerships with other programs to promote school safety <p><small>CERT Program Manager: Procuring and Managing Resources 6-31</small></p> <p>Display Slide 6-31</p>	<ul style="list-style-type: none">▪ If you are starting a CERT program in partnership with a school district, grant money may be available under the Federal Department of Education's Safe and Drug Free Schools Program. "Readiness and Emergency Management for Schools" (REMS) grants are awarded on a competitive basis to local school districts and encourage partnerships with other programs to promote school safety. For more information, visit http://www2.ed.gov/programs/dvpemergencyresponse/index.html
 <p>Funding Sources</p> <ul style="list-style-type: none">• In addition to the sponsoring agency and other government sources, what are some other sources of funding or support for a CERT program?<ul style="list-style-type: none">– Solicit donations– Charge a fee– Ask for in-kind donations– Apply for a grant– Establish or align with a not-for-profit organization <p><small>CERT Program Manager: Procuring and Managing Resources 6-32</small></p> <p>Display Slide 6-32</p> <p>Conduct a class discussion by asking this question.</p> <p><i>This slide is animated. The first click displays the question. The second click displays the responses.</i></p> <p>Before moving on, ask the participants if they have any questions.</p> <p>PM, P. 6-19 to 6-20</p>	<p>Ask participants:</p> <p>In addition to the sponsoring agency and other government sources, what are some other sources of funding or support for a CERT program?</p> <p>Summarize the discussion by listing other sources of support and funding:</p> <ul style="list-style-type: none">▪ Solicit donations▪ Charge a fee▪ Ask for in-kind donations▪ Apply for a grant▪ Establish or align with a not-for-profit organization <p>Note that there are alternatives to establishing a not-for-profit organization that may provide the same benefits. These are included in the <i>Sources of Program Support</i> in the Participant Manual and on the following pages in the Instructor Guide. Examine each of these options in more detail.</p>

PM, P. 6-19 to 6-20	Sources of Program Support
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Solicit donations. Some corporations, businesses, and service clubs have a history of supporting community programs and include it in their donations plan. Try to determine how CERT can benefit them and can fit into their donations plan before you approach them. The worst thing that can happen is that they will say no. When soliciting donations, ensure that you recognize business contributions on your Web site or in your newsletter. Talk with your budget person to see if monetary donations can be managed as a separate account for CERT within your department. This can require formal actions such as a resolution by city council and/or the creation of a special fund in the city's budget.

Charge a fee. Some communities charge a fee to cover the costs of their materials and equipment. While this is not the preferred method for funding CERT programs, it is a viable alternative in some communities. Be careful if you plan to develop CERTs in low-income areas. Many residents in low-income areas cannot afford to pay for a CERT program and will not be able to attend if there are out-of-pocket costs involved, although they may be able to make some donation.

Businesses may be more willing to pay for CERT training because they can show a direct benefit to their operations. One community charged businesses for the training, explaining that this money would be used to support neighborhood training. Tip: If you don't mention a particular price, they usually end up giving you more than you would have asked.

Solicit in-kind contributions. Corporations may be more willing to donate materials or supplies for CERTs, rather than money. If this is the case, try to gain donations for items that are critical to the program. You will need hardhats, flashlights, batteries, rope, printing services, recharging of fire extinguishers, and a lot more. Offer attribution as a sponsor of CERT programs in exchange for the donation, and follow up with a formal thank you.

Also, utility companies have a track record for providing the mockups you'll need to demonstrate how to turn off gas and electrical utilities. Approach your local utilities to explain your program. You might be surprised at what they'll offer. (They may also have supplemental training programs to offer your CERT graduates.)

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Apply for a grant. Grants may come from government or private sources. The Department of Homeland Security through the States is making grant funding available for local CERT training. For more information, contact your State Office of Emergency Management/Homeland Security, or visit www.fema.gov/grants. If you are starting a CERT program in a school district, Readiness and Emergency Management for Schools (REMS) grant money may be available under the Federal "Safe and Drug Free Schools" program in the Department of Education. More information is available at <http://www2.ed.gov/programs/dvpemergencyresponse/index.html>. Additionally, some corporations also offer grants for specific causes, including emergency preparedness.

Grant writing is a particular skill so take a course to learn how to do it correctly or find a resource in the community to help you, e.g., not-for-profit organization, community college.

Remember, though, that grant funding is temporary. Even if you get a grant to get your program started, you will have to find a permanent source of funding for program maintenance.

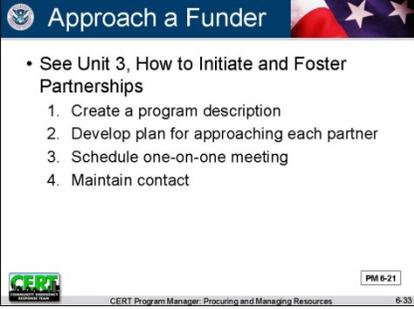
Establish a not-for-profit organization. Some CERT programs have established themselves as not-for-profit organizations, which are also called 501(c)(3) organizations. Organizations need to complete and submit an application for 501(c)(3) status and, typically, CERT programs that have done so are well established, rather than startup groups. However, if CERT programs can be organized as 501(c)(3) organizations, they are able to raise funds through tax deductible contributions from donors.

Getting and maintaining 501(c)(3) status requires significant work and a fee, and an annual filing with the IRS after tax exempt status has been established. There are two alternatives:

1. Rather than becoming a 501(c)(3) organization yourself, look in the community for an already established 501(c)(3) organization that would be a fiscal agent for you.
2. Check with your local jurisdiction's attorney to find out if the CERT program could use the jurisdiction's tax ID number to receive tax deductible contributions from donors. This would provide the same benefit as 501(c)(3) status.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>• See Unit 3, How to Initiate and Foster Partnerships</p> <ol style="list-style-type: none">1. Create a program description2. Develop plan for approaching each partner3. Schedule one-on-one meeting4. Maintain contact <p>Display Slide 6-33</p> <p>PM, P. 6-22</p>	<h3>How to Approach a Funder</h3> <p>Remind participants of the steps discussed in Unit 3 in the section How to Initiate and Foster Partnerships.</p> <ol style="list-style-type: none">1. Create a program description.2. Develop a plan for approaching each partner.3. Schedule a one-on-one meeting.4. Maintain contact. <p>Explain that funders need to be approached in much the same way as partners are (see Unit 3, How to Initiate and Foster Partnerships).</p> <p>Refer participants to the <i>Approach a Funder Checklist</i> in the Participant Manual and on the next page in the Instructor Guide.</p> <p>Review the checklist with participants.</p>

PM, P. 6-22	Approach a Funder Checklist
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1. Present the program description along with financial information.
 - a. Project the income and expenses for 1-5 years.
 - b. Remember that funders want to know about tangible results, e.g., what will be done, how many people will be trained.
 - c. Businesses of any size that might contribute to the local CERT program will also want to know how they will benefit, e.g., community relations.

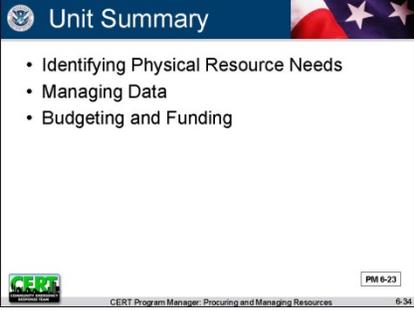
2. Develop a plan for approaching each partner.
 - a. In addition to the items in Unit 3, identify other people and organizations that can provide recommendations for you.

3. Schedule a one-on-one meeting.
 - a. Practice your presentation several times before the meeting.

4. Maintain contact after the meeting.
 - a. Keep yourself visible without being overbearing.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
	<p>Do experienced Program Managers have anything to add about procuring and managing resources?</p>
 <p>Display Slide 6-34</p> 	<p><i>Unit Summary</i></p> <p>Tell participants that this unit has looked at procuring and managing resources:</p> <ul style="list-style-type: none">▪ Identifying Physical Resource Needs▪ Managing Data▪ Budgeting and Funding <p>Do you have any questions about anything covered in this unit?</p> <p>Transition</p> <p>The next unit will discuss how to build a plan for delivering and managing safe training and exercises.</p>

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