

Emergency Operations Center (EOC) Skillset: Finance

Task Categories:

Administer financial management for jurisdictional expenditures

Advise EOC leadership and staff on financial matters associated with jurisdictional activities

Task Category: Administer financial management for jurisdictional expenditures

TASKS	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
1. Demonstrate knowledge of jurisdictional/organizational procurement policies: <ul style="list-style-type: none"> • Standard operations • Emergency operations • Cost-tracking processes and requirements: <ul style="list-style-type: none"> ○ Preapproved vendors ○ On-call contracts 	E, F, I, J		
2. Demonstrate awareness of fiscal implications and requirements when: <ul style="list-style-type: none"> • Requesting or activating resources • Operating under various types of emergency or disaster declarations • Receiving external, Federal, or state assistance • Using volunteer resources 	E, F, I, J, T		
3. Ensure policies and procedures are in place to comply with applicable reimbursement requirements.	E, F, I, J		
4. Seek information on the financial requirements of incoming resources, such as: <ul style="list-style-type: none"> • National Guard assets • Mutual aid resources 	E, F, I		
5. Demonstrate knowledge of jurisdictional fiscal management, operations, processes, procedures, thresholds, and constraints.	E, F, I, J		
6. Establish and communicate protocol to track and maintain incident-related financial documentation, such as invoices, payroll logs, and contracts.	E, F, I		

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<p>7. Collect, track, and document data related to funding and expenses:</p> <ul style="list-style-type: none"> • Monitor compensation processes for time and pay • Coordinate with risk management on costs involved in workers' compensation claims, damage claims, tort claims, and other incident-related claims • Implement plan to coordinate and manage monetary donations • Coordinate, collect, and track volunteer time and maintain documentation for potential reimbursement requests • Identify and follow any use limitations for various funding sources • Maintain awareness of FEMA financial guidance, including standard equipment rates, labor categories, preexisting contracts, indirect costs, fringe benefits, and established vendor lists • Identify and organize data relevant to grant or reimbursement applications 	E, F, I, J		
<p>8. Coordinate with organizational representatives to identify additional discipline-specific funding sources.</p>	E, F, I, J		
<p>9. Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources:</p> <ul style="list-style-type: none"> • Track jurisdictional burn rate 	E, F, I		

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<p>10. Review resource requests with resource management personnel to verify understanding of request and provide input on course of action:</p> <ul style="list-style-type: none"> • Suggest cost-efficient alternatives to obtaining requested resources, as appropriate 	E, F, I		
<p>11. Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.</p>	E, F, I		
<p>12. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.</p>	E, F, I		
<p>13. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.</p>	E, F, I		