

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

TASK	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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7. Collect, track, and document data related to funding and expenses: <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		
8. Coordinate with organizational representatives to identify additional discipline-specific funding sources.	E, F, I, J		
9. Monitor and verify costs and expenditures by reviewing requests, invoices, time cards, activity logs, and other available documentation or resources: <ul style="list-style-type: none">● Track jurisdictional burn rate	E, F, I		

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

TASK	CODE	EVALUATION RECORD #	EVALUATOR INITIALS AND DATE
10. Review resource requests with resource management personnel to verify understanding of request and provide input on course of action: <ul style="list-style-type: none">● Suggest cost-efficient alternatives to obtaining requested resources, as appropriate	E, F, I		
11. Coordinate with resource management personnel, legal personnel, and EOC leadership to execute contracts, Memorandums of Understanding (MOU), Memorandums of Agreement (MOA), and purchases.	E, F, I		



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12. Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.	E, F, I		
13. Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.	E, F, I		