

# Emergency Resource Request Management Handbook

March 30, 2018

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# Introduction

The *Emergency Resource Request Management Handbook* provides guidance to governmental and non-governmental organizations within the Portland Metropolitan Region (PMR) on how to request resources in a major emergency and manage the emergency resource request process. The PMR spans Clackamas, Columbia, Multnomah, and Washington Counties in Oregon and Clark County in Washington, as shown in the figure below.

**Figure 1: Portland Metropolitan Region**



The *Handbook* provides guidance on the entire resource request management life cycle, from the formation and submission of the request to the closeout of the order and the payment of the provider. This document is intended to be a quick reference guide to the navigation of the emergency resource ordering process.

## Handbook Purpose

The purpose of the *Handbook* is to provide standardized guidelines, procedures, and tools that all stakeholders in the PMR can use to efficiently and effectively request resources and process resource requests.

Stakeholder understanding of how to navigate local government resource management is paramount. Escalation of resource orders through local government can not only give access to the resources from local governments (e.g., fire/emergency medical services [EMS], law enforcement, and public works resources or from the private sector) but can also result in the mobilization of resources from county, regional, state, national, and international sources.

The processes provided in the *Handbook* are standardized to apply to all stakeholders within the region; however, cities and counties within the PMR may have specific financial, administrative, or other requirements they must follow when completing the resource request process. Resource requesters and

local resource request managers should coordinate with the responsible officials within their agency to ensure compliance with all financial and administrative requirements.

### *Intended Audience*

The primary intended audience for the *Handbook* includes:

- City and county governments;
- Public safety agencies;
- Special purpose agencies;
- Agencies created through intergovernmental or interlocal agreements; and
- Non-government organizations with a role in response and recovery, including:
  - Medical care providers;
  - Utilities;
  - Critical infrastructure managers;
  - Human service providers; and
  - Other non-profit and volunteer organizations.

The *Handbook* provides guidance for any organization in the region that may be involved in resource ordering through local government agencies in the PMR. This can involve organizations that may either request resources or provide resources that support emergency response and recovery.

## How to Use this Guide

The *Handbook* is organized to provide guidance to the following stakeholder groups:

- **Resource Requesters:** Governmental or non-governmental organizations that need resources to fulfill their responsibilities during an emergency.
- **Local Resource Request Managers:** Stakeholders within a department operations center (DOC) or an emergency operations center (EOC)<sup>1</sup> who are responsible for processing resource requests.
- **Regional Resource Request Stakeholders:** Resource management stakeholders in the PMR who coordinate at the regional level to determine resource needs and the availability of resources from their organization to meet the needs of the requesting organizations.

### *Implementation Tools*

The *Handbook* provides a set of tools to implement the processes included in the following sections. These tools, which are available as appendices and referenced throughout the *Handbook*, support consistent implementation of procedures and ensure that essential information is documented and shared. Organizations can use and modify any of these tools to meet their own resource request management processes.

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<sup>1</sup> 'Emergency operations center' typically refers to an emergency operations facility with staff from multiple departments, divisions, and agencies. It may also be referred to as an emergency coordination center (ECC) or other name (e.g., Geographic Areas Coordination Center, Joint Field Office). 'Emergency operations center' will be used throughout the *Handbook* to refer to all of these facilities.

Specifically, the *Resource Request Form* was designed to build on a national practice of using forms such as the Incident Command System (ICS) general message form (ICS 213) to submit a resource request; the resource order forms (ICS 260 series) to manage ordering; the ICS 213 RR, which consolidates request and ordering functions; or locally developed forms to support each organization’s resource request process. The *Resource Request Form* collects all information gathered throughout the resource management process, in parallel with the *Resource Request Tracking Sheet*, and is designed to allow organizations to only use the sections of the form that are relevant to their processes.

The *Resource Request Form* can support regional and multi-agency resource management in the PMR. Stakeholders are strongly encouraged to use the resource request portion of the form to submit any interagency or regional requests. This standard form should be recognized by local government ordering points (i.e., EOCs) and can support consistent and efficient processing of the request.

### *Contents of the Handbook*

The sections of the *Handbook*, listed in Table 1 below, provide guidance on specific processes for resource requesters, local resource request managers, and regional resource request stakeholders.

**Table 1: Emergency Resource Request Management Handbook Contents**

Section	Description
<b>Getting Started</b>	Provides baseline information about the resource request management process for resource requesters and resource request managers, including emergency resource ordering principles, the transition from routine to emergency ordering, and business and purchasing rules.
<b>Resource Requester Guide</b>	Provides guidance for resource requesters on how to determine their resource needs, initiate a resource request, and navigate the resource request process.
<b>Resource Request Management Guide</b>	Provides guidance for local resource request managers in an EOC to efficiently process resource requests, identify resource availability, and communicate with resource requesters to ensure the provision of resources to meet life-safety, life-sustaining, and other response missions.
<b>Regional Resource Request Management Coordination</b>	Provides guidance for resource request management stakeholders in the PMR on how to coordinate as a region to determine resource needs and allocate available resources.
<b>Mutual Aid Channels</b>	Provides information on the mutual aid channels that are available to resource requesters and resource request managers within the PMR.
<b>Implementation Tool Appendices</b>	<p>Provides tools for use by resource requesters and resource request managers to implement the processes detailed in the <i>Handbook</i>.</p> <ul style="list-style-type: none"> <li>• <b>Appendix 1: Resource Request Form:</b> A standardized form for use by the resource requester to request resources, by resource request managers to process these requests, and by resource managers to track the use of the resource.</li> <li>• <b>Appendix 2: Resource Request Tracking Sheet:</b> A tool that aligns with the Resource Request Form to provide an alternate way to track resource requests and resources.</li> </ul>

Section	Description
	<ul style="list-style-type: none"> <li>• <b>Appendix 3: Incident Finance and Administration Worksheet:</b> A tool to identify incident-specific authorities and decision points, as well as guidelines for activating certain mutual aid agreements.</li> <li>• <b>Appendix 4: Delegation of Authority Forms:</b> Memo templates which organizations may use to delegate authority for purchasing during emergencies.</li> <li>• <b>Appendix 5: Regional Coordination Call Agenda:</b> A standardized template to guide a Regional Coordination Call.</li> <li>• <b>Appendix 6: Key Questions for Resource Requests:</b> A list of questions for resource requesters to use when determining their resource needs before making a request.</li> <li>• <b>Appendix 7: Non-Competitive Procurement Guidelines:</b> Guidance for meeting the Federal Emergency Management Agency (FEMA) procurement requirements.</li> <li>• <b>Appendix 8: Resource Contact Algorithm:</b> A flow chart designed to provide guidance to resource requesters on whom to contact for their resource needs.</li> <li>• <b>Appendix 9: Glossary:</b> A glossary of terms used in the <i>Handbook</i>.</li> <li>• <b>Appendix 10: References:</b> A list of references for additional information on the resource request management process.</li> </ul>
<b>Handbook Overview and Management Annex</b>	Provides information about the development and maintenance of the Handbook.

# Getting Started

## Principles of Emergency Resource Management

Major incidents can result in hundreds or thousands of resource requests, many of which may support life-saving and life-sustaining activities. At the same time, most financial and procurement rules will remain in effect during a major incident, as should the expectation that government maintain responsible stewardship of public funds. Therefore, 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; and
- Restocked and reimbursed properly.

See the National Incident Management System (NIMS) (October 2017) for a summary of national level resource management principles. This includes a description of a six-step incident resource management process and guidelines for mutual aid.

Resource management starts prior to a disaster with the identification of resource needs, obtaining resources, inventorying resources, and maintenance of resources. During an incident, the resource request process starts at the incident site with responders identifying resources needed to support emergency response. Resource needs and availability change as an incident evolves. Responders may require support from neighboring cities and counties, as well as the state or federal government. Figure 2 provides an overview of the complete resource management process.

Figure 2: Resource Management Process Overview



Coordination among all response partners should begin as early as possible and preferably prior to incident response. The figure below outlines the considerations for identifying resource needs throughout the incident.



Figure 3: Considerations for Resource Need Identification



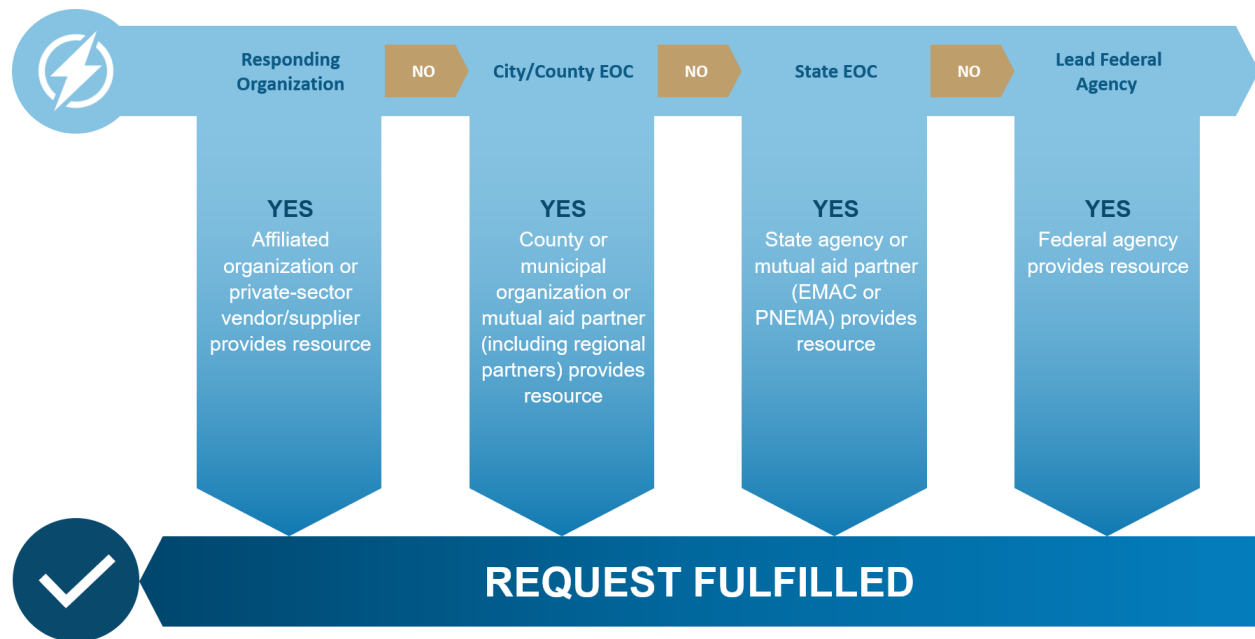
After the organization identifies the need for a resource, it should begin the resource request process. The table and figure below provide a brief overview of this process; detailed process descriptions for the resource requester can be found in the *Resource Requester Guide* section and detailed resource request management processes can be found in the *Resource Request Management Guide* section.

Table 2: Resource Request Process Overview

Step	Description
1	An organization should first attempt to find the resource internally, through affiliated organizations or through vendors or other suppliers.
2	<p>If resources cannot be found internally, the requesting organization should forward the request to the city EOC, if the organization is in an incorporated city. If resources cannot be filled by the city EOC or if the organization is not in an incorporated city or is a regional organization, the request is elevated to the county EOC.</p> <p>The EOC determines if fulfillment is possible with county resources (owned or procured) or personnel, through mutual aid, or from neighboring or regional counties (see the <i>Regional Request Management Coordination</i> section for more information).</p> <p><b>Note:</b> The requesting organization is responsible for paying for the requested resource, unless other arrangements are in place.</p>
3	<p>If the county is unable to fulfill the request, it should request the resource from its state, through the Oregon Office of Emergency Management or Washington Emergency Management Division, as appropriate. The state will try to fulfill the request using:</p> <ul style="list-style-type: none"> <li>• State resources;</li> <li>• State vendors or suppliers;</li> <li>• Intra-state mutual aid; and</li> <li>• Inter-state mutual aid.</li> </ul> <p><b>Note:</b> In Oregon and Washington, intrastate mutual aid systems allow for any jurisdiction or tribe to directly request assistance from any other jurisdiction or tribe. Local (city or town) and tribal jurisdictions are encouraged to work with their county and state emergency management agencies to coordinate intrastate mutual aid.</p>

Step	Description
4	If the state cannot fulfill the request they can submit the request to the Federal Government via FEMA or the lead federal agency of an emergency support function (ESF). The Federal Government will use federal resources or federal vendors and suppliers to fulfill the request.



**Figure 4: Resource Request Process Overview**



### *Partners in Resource Management*

Local organizations may have internal resource management and request processes that align with other internal policies and processes, as shown in the table below. These organizations and agencies must follow their processes, as well as coordinate with each other, to identify needed resources during a disaster and ensure that resource requests are handled efficiently.

**Table 3: Local Organization Resource Requesting Organizations**



Organization	Description
 <b>City or County Agencies</b>	City and county agencies have their own resource inventories, including equipment and personnel, that they can source through internal processes to meet their disaster responsibilities. For example, law enforcement will use their dispatch system to request resources.
 <b>Private Sector</b>	Private sector organizations have their own resource inventories and their own suppliers. For example, healthcare systems can often access resources within warehouses or elsewhere in their networks.






Organization	Description
 <p><b>Volunteer Organizations</b></p>	<p>Volunteer organizations have their own resource sources, sometimes through regional and national networks, to meet their disaster responsibilities. For example, the American Red Cross has local, regional, and national networks of volunteers and staff that can be deployed if necessary during an emergency.</p>
 <p><b>Regional Organizations</b></p>	<p>Regional organizations have directed missions to support the response and their own resource inventories to support their mission. Regional organizations include, but are not limited to, the following:</p> <ul style="list-style-type: none"> <li>• Metro;</li> <li>• TriMet;</li> <li>• C-TRAN;</li> <li>• Healthcare systems; and</li> <li>• Port of Portland.</li> </ul>
 <p><b>Special Purpose Agencies</b></p>	<p>In the context of the <i>Handbook</i>, special purpose agencies refer to all other local government organizations, other than cities and counties that have directed missions to support incident response and their own inventory of resources and dispatch systems to support their mission. Examples of these organizations include, but are not limited to, fire districts, school districts, water and sewer districts, and drainage districts, and some 911 agencies (e.g., Washington County Consolidated Communications Agency (WCCCA), Clark Regional Emergency Services Agency (CRESA), Clackamas County C800, Multnomah County Fire Defense Board).</p>

### NIMS Resource Groupings

NIMS identifies seven general response resource groupings (or ‘kinds’ of resources), identified in the table below. Each resource kind typically has common requirements for ordering, tracking, and administration. For example, equipment is commonly rented, leased, or borrowed and must be carefully demobilized. Supplies, on the other hand, are typically directly purchased or granted and are not recovered.

**Table 4: Resource Kinds**

Kind	Description
 <p><b>Personnel</b></p>	<p>Includes overhead and incident management staff, technical specialists, EOC staff, operations staff, and volunteers. Personnel are typically reimbursed individually, as opposed to teams, which are reimbursed as a unit. Though unpaid, volunteer time should also be tracked.</p>
 <p><b>Teams</b></p>	<p>Refers to groups of specially trained personnel. May include team equipment and supplies. Typically, teams are reimbursed as a single unit.</p>

Kind	Description
 <b>Facilities</b>	Includes office space, shelters, warehouses, distribution sites, points of dispensing, command posts, and bases. Facilities can be rented, leased, or donated. A site use agreement is typically required.
 <b>Equipment</b>	Refers to pieces of equipment, with or without the personnel needed to operate them. Equipment rates should be determined prior to the request being finalized. Equipment should be jointly inspected before and after use.
 <b>Supplies</b>	Includes any non-equipment resource, including potable water, plywood, tarps, and cots. Identifying providers and standard pricing structures for commonly requested supplies prior to a request can expedite the resource ordering process in an emergency.
 <b>Vehicles</b>	Includes automobiles and buses. Usage rates and operator considerations (e.g., capabilities, number of operators) should be determined prior to the request being finalized. Vehicles should be jointly inspected before and after use.
 <b>Aircraft</b>	Includes surveillance platforms (including drones), medevac, or cargo configurations.

## Transition to Emergency Resource Management

While most small-scale incidents or planned events can be successfully managed using routine resource management processes, larger incidents will tax routine systems. Larger incidents result in a higher volume of resources, unique resources (e.g., specialty teams, state and federal resources), and mutual aid resources. Each of these presents a resource management challenge that will require enhanced resource management methods.

When a dispatch center is overwhelmed, the center may transition to an expanded dispatch or may activate other disaster dispatching procedures. These are methods that allow dispatch centers to strategically manage requests for service and resources.

Emergencies that extend past typical day-to-day emergency response may require an expanded dispatch, county fire defense board, DOC, or EOC to play a role in resource management. Clear thresholds, well-understood transition protocols, and specific changeover timeframes are needed when these organizations are activated to support resource management, minimize confusion, and ensure resource requests are received.

A DOC and EOC may also play a role in supporting an expanded dispatch or the implementation of disaster dispatching procedures. When these methods are activated, the EOC may manage requests for all non-public safety resources (e.g., sandbags, aircraft, heavy equipment).

Fire agencies have a pathway to request fire resources that does not typically involve EOCs. When a fire agency has exhausted its resources and local mutual aid resources, that agency may request support



from the county fire defense board chief in Oregon and the regional fire defense board chair in Washington state, which can then obtain resources through the fire marshal's office of each state. The state fire marshal's office then requests resources through other fire defense boards and from the Oregon Department of Forestry or Washington State Department of Natural Resources.



In addition to helping dispatch centers, implementing emergency resource management processes also has the benefits, including, but not limited to, the benefits listed below.

- Takes the sourcing burden off agencies and incident managers by providing a single ordering point.
- Provides access to expanded mutual aid networks. EOCs commonly have access to local, regional, and statewide mutual aid networks.
- Provides access to state, federal, and international resources. County EOCs are the local access point for most state, federal, and international resources.
- Supports the identification, management, and prioritized allocation of scarce resources.
- Supports the strategic management of critical resources.
- Ensures that incoming resources are sufficiently supported (e.g., staging, maintenance, fuel, lodging, food).
- Supports the tracking of incident costs and ensures that federal disaster assistance requirements are met.

The following table describes typical tasks that should occur to aid in the transition to emergency resource management, including thresholds, communication, and outstanding resource request tracking.

**Table 5: Transition to Emergency Resource Management**

Consideration	Description
Resource Management Modification Thresholds (Common)	 <p><b>Local disaster or emergency declaration</b></p> <p>An emergency declaration by a jurisdiction can facilitate the transition to emergency resource management by authorizing the suspension or alteration of standard purchasing and procurement rules.</p>
	 <p><b>EOC activation</b></p> <p>For many incidents, activation of the EOC signals the transition to emergency resource management processes.</p> <p>The EOC may provide strategic coordination of resource requests. In a large and complex incident, EOCs may recognize a high level of competition among cities and counties for critical resources. In that situation, an EOC may ask that requesting organizations request resources through the EOC rather than making direct contact with mutual aid providers (i.e., “turning off mutual aid”). This enables a prioritized resource allocation from the EOC.</p>

Consideration	Description
<b>Ideal Communications</b> 	<b>Pre-scripted messaging</b> Pre-scripted messages should be used by organizations to effectively inform response stakeholders of the transition to emergency resource management processes. The organization should script messages regarding activation of the EOC, resource management procedures, communication procedures, and other important considerations before a disaster. Pre-scripting these messages removes the burden of having to write and gain leadership approval of messages during a disaster.
<b>Outstanding Resource Requests</b> 	<b>Tracking</b> If a resource request was initiated using routine resource management processes and not completed before the transition to emergency resource management processes, the organization managing this request is responsible for either tracking the resource request until it is completed or transitioning the resource request to emergency processes, in coordination with the EOC.

### *Importance of Early Notification and Activation*

Emergency resource request and management processes are not commonly used. Some personnel may not have current training or experience with resource management processes. Therefore, these processes are often unfamiliar to many organizations. They may rely on their routine processes for as long as possible, delaying their transition to emergency processes, potentially resulting in overwhelmed dispatchers and slow and inadequate response to resource requests.

Responders should keep their leadership, dispatch centers, and emergency managers informed of situations that may overwhelm the routine emergency response system. In turn, these entities are responsible for assessing the impacts of an incident, notifying stakeholders, and preparing to activate their emergency resource management systems.

## Emergency Resource Management Procurement

During disasters or emergencies, an organization's day-to-day resource management and procurement requirements may change to meet immediate resource needs. A complex event may require a local declaration of emergency. A city or county may alter or enhance authorities related to the following:

- Purchasing power;
- Spending limits;
- Resource sourcing; or
- Cost tracking.

In order to meet the requesting organizations' needs, EOC Operations, Logistics, and Finance section personnel should assess whether existing resource ordering procedures meet the specific needs of the incident and identify required changes to resource management processes to meet these needs. These changes should be documented and implemented within the Finance, Logistics, and Operations sections in the EOC. The following table identifies how these processes can change. *Appendix 3: Incident Finance*

and *Administration Worksheet* provides a tool for identifying incident-specific authorities and decision points, as well as guidelines for activating certain mutual aid agreements.

**Table 6: Emergency Resource Management Business Processes**

Process	Description	Considerations for Implementing in Emergencies
<b>Adjust Purchasing Power</b>	Each organization has staff with purchasing authorities. Authorizations may need to be expanded to support expedited ordering.	An organization can use <i>Appendix 4: Delegation of Authority Forms</i> to officially delegate authorities to additional or alternate staff.
<b>Adjust Spending Limits</b>	Each organization should have credit limits on purchase cards (P-cards) or not-to-exceed limits on contracts in alignment with local, state, and federal mandates on expenditures. These limits may need to be raised to meet an increased purchasing need during the incident.	<ul style="list-style-type: none"> <li>Organizations can choose to pre-define emergency spending limits or define them for each individual incident.</li> <li>Cities and counties in Oregon and Washington are bound to normal spending limits unless otherwise identified in the authorities under a local declaration of emergency as appropriate.</li> </ul>
<b>Identify Required or Preferred Sources</b>	Each organization should have contracts and mutual aid agreements for procuring resources during an emergency. Agencies may desire to require or suggest specific types of sources (e.g., mutual aid, donations).	<ul style="list-style-type: none"> <li><i>Appendix 7: Non-Competitive Procurement Guidelines</i> provides requirements to ensure reimbursement eligibility for no-bid expenses.</li> <li>Finance authorities should engage existing vendors pre-incident to determine their true service capacity during an emergency and to secure additional contracts, if needed, to ensure resources and service provision.</li> <li>To minimize costs, agencies may encourage the use of no-cost/low-cost sources, such as donations, volunteers, or mutual aid.</li> </ul>
<b>Set Cost Tracking Requirements</b>	An organization that requests resources is financially responsible for the resource; it must be able to track resource costs to ensure awareness of total financial burden and for documentation requirements for cost recovery.	<ul style="list-style-type: none"> <li>Organizations must maintain a tracking system for all resources used during disaster response and recovery that includes the time and costs related to those resources.</li> <li>Organizations must have an account of all costs associated with the emergency response to qualify for federal reimbursement (if they are included under a federal declaration).</li> <li>Organizations should establish their tracking system and procedures before a disaster to ensure proper records that meet all federal requirements.</li> </ul>

Process	Description	Considerations for Implementing in Emergencies
		<ul style="list-style-type: none"> <li>Organizations should identify any financial and administrative requirements in their insurance policies associated with tracking resource and cost information within their organization as well as with any mutual aid partner.</li> <li>Organization should identify donation tracking systems, including the cost associated with the donated resource.</li> </ul>

## Roles and Responsibilities

The following table outlines the roles and responsibilities for city, county, regional organization, or special purpose agency requesters and city or county resource request managers in resource request management processes.

**Table 7: Resource Request Roles and Responsibilities**

Resource Request Role	Responsibility
<b>Resource Requester</b>	<ul style="list-style-type: none"> <li>Identifies resource needs within the organization and requests resources from its EOC.</li> </ul> <p><b>Note:</b> This can be a city or county organization, a special purpose agency, a private-sector response partner, or a volunteer organization with a response mission or responsibility during the disaster.</p>
<b>EOC Operations Section</b> (staff with resource request management responsibilities, resource request managers)	<ul style="list-style-type: none"> <li>Receives resource request and verifies request information and legitimacy.</li> <li>Coordinates with the Logistics Section to assign priority levels to requested resources and to identify resource needs.</li> <li>Identifies, assigns, and supervises resources being coordinated by the EOC within the Section.</li> <li>If unable to fill the request through the departments or functions working within the Section, forwards the request to the Logistics Section.</li> </ul>
<b>EOC Logistics Section</b> (staff with resource request management responsibilities, resource request managers)	<ul style="list-style-type: none"> <li>Receives resource request from Operations Section, identifies source for resource, and orders resource.</li> <li>Coordinates with the following entities: <ul style="list-style-type: none"> <li>Operations Section, to assign priority levels to requested resources and to identify resource needs and the availability of intra-agency resources;</li> <li>Finance Section, to procure resources; and</li> <li>Planning Section, to track resources once obtained and deployed.</li> </ul> </li> </ul>



Resource Request Role	Responsibility
EOC Finance Section	<ul style="list-style-type: none"> <li>• Procures and pays for resources.</li> <li>• Coordinates with Logistics Section to identify resource needs for procurement.</li> <li>• Coordinates with ordering authority to approve resource orders.</li> <li>• Tracks costs.</li> </ul>
EOC Planning Section	<ul style="list-style-type: none"> <li>• Tracks deployed and critical resources and identifies resource shortages.</li> <li>• Coordinates with the Logistics Section to identify resource needs and deployed resources.</li> </ul> <p><b>Note:</b> Depending on how the EOC is organized, the Resources Unit may have these responsibilities. The Resources Unit is typically organized under the Planning Section, but that function may also be organized under the Logistics Section. If a Resources Unit is established, they should fulfill these responsibilities, regardless of whether they are organized under the Planning Section or Logistics Section.</p>

# Resource Requester Guide

## Determining Resource Needs

Resource availability and needs will change throughout the incident lifecycle, so resource requesters should continuously assess their comprehensive resource needs. In addition to identifying resources that are immediately needed, resource requesters should also plan for resource needs in subsequent operational periods and resources for which they expect a recurring need. While resource requesters should be aware of resource shortages, they should identify all needs and request the resources as soon as the need is identified, regardless of known shortages, so that all critical resource needs can be filled in time.

As organizations identify resource needs, they must first determine if the resource is available within their inventory. If they do not have a resource internally, organizations can consult *Appendix 8: Resource Contact Algorithm* to determine whom to contact regarding their resource need. They should then begin the process of establishing or activating their ordering process.

### Tips and Tricks

- Pre-incident planning efforts can include determining the tasks an organization must complete to meet its emergency responsibilities and identifying the resources needed to accomplish these tasks.
- As soon as an organization receives notice of a disaster, it can start identifying the resources needed to respond throughout the disaster, either based on experience or by using a pre-developed list.
- In some cases, resource requesters can secure blanket approval for resource requests to increase efficiency.

## Setting an Ordering Process

Once an organization determines the need to request resources from an EOC, they should take the following steps to ensure efficient processing of their requests:

**Table 8: Establishing an Ordering Process**

Step	Description
1	<p>Identify a single person or position authorized to coordinate the submission of all resource requests for the organization. Provide direction for staff to forward all requests to this person or position. As needed, assign assistants to this position to support the ordering and resource request process; however, the number of people initiating requests should be minimized.</p> <p>If multiple people are initiating requests, have each person process similar kinds of requests (e.g., equipment, supplies, personnel).</p> <p><b>Note:</b> This is recommended to manage the number of personnel involved in the resource request process. Larger numbers of personnel working on the same process can result in duplicate orders and loss of awareness of resource request status.</p>

Step	Description
2	Fill out <i>Appendix 3: Incident Finance and Administration Worksheet</i> to identify the specific authorities and requirements that will apply to ordering, procurement, and financial management during the incident. This will serve as internal guidance for the organization on the resource ordering process throughout the incident.
3	Communicate the person(s) or position(s) authorized by the organization to request resources to the EOC. This provides a reliable way to ensure that requests are authorized. This information can be communicated through an email or phone call to the EOC. This can also be noted on the <i>Incident Finance and Administration Worksheet</i> and forwarded to the EOC.

## Resource Request Process Initiation

Once an organization has identified a resource need that it cannot fulfill, either through its own resources or through private vendors, it should submit a completed *Resource Request Form* to the EOC. The resource requester *must* secure authorization before the request may be submitted.

*Appendix 1: Resource Request Form* includes detailed instructions for filling out each field. *Table 9: Resource Request Process and Resource Request Form References* provides guidance on the resource request process and references where the information identified from the process will be entered into the *Resource Request Form*.

### Resource Request Process

**Table 9: Resource Request Process and Resource Request Form References**

Step	Description	Resource Request Form Reference
1	Identify all information regarding the resource need including: <ul style="list-style-type: none"> <li>• Payment information;</li> <li>• Support needs;</li> <li>• Delivery;</li> <li>• Transportation issues; and</li> <li>• Safety Issues.</li> </ul> See <i>Appendix 6: Key Questions for Resource Requests</i> for additional guidance.	N/A
2	Determine the appropriate organization or EOC to contact regarding the resource request using the <i>Resource Contact Algorithm</i> .	N/A
3	Determine the kind of resource needed (see <i>Getting Started</i> for information on resource kinds). If requesting multiple items, it will help the EOC if requests are separated out by resource kinds (e.g., supplies, equipment, personnel).	Section I: Request Information

Step	Description	Resource Request Form Reference
4	<p>Collect all information about the incident and the requester, including:</p> <ul style="list-style-type: none"> <li>• Contact information for the requester position;</li> <li>• Contact information for the person filling out the form (if different than the requester);</li> <li>• Contact information for the beneficiary organization (i.e., the organization that will be the recipient of the resource); and</li> <li>• The incident name and/or incident number (i.e., local or state assigned incident name and/or number).</li> </ul>	<p>Section I: Request Information</p> <p>Section II: Resource Request Fields 1-3</p>
5	<p>Identify the resource needed. Collect as much detail as possible (see <i>Key Questions for Resource Requests</i>).</p> <ul style="list-style-type: none"> <li>• Determine if comparable alternatives to the requested resource are acceptable. <ul style="list-style-type: none"> <li>▪ The EOC will contact the requesting organization to receive approval for any alternative.</li> </ul> </li> <li>• Determine support requirements (e.g., maintenance, fueling, trained staff for operation).</li> </ul> <p>Collect information about the mission for the resource (e.g., provide emergency power to a facility).</p> <ul style="list-style-type: none"> <li>• By completing this section, the requesting organization can allow the EOC to identify alternative solutions that can meet the resource needs and requirements.</li> <li>• This is required if comparable alternatives are acceptable.</li> </ul>	<p>Section II: Resource Request Fields 4-5</p>
6	<p>Identify where, when, and who will receive the resource:</p> <ul style="list-style-type: none"> <li>• Date and time the resource is needed;</li> <li>• Amount of time (duration) the resource is needed;</li> <li>• If the resource is needed on a recurring basis (e.g., supplied twice daily for 10 days or once every three days);</li> <li>• Delivery location (i.e., address, location);</li> <li>• Delivery considerations (e.g., access restrictions, ability to unload); and</li> <li>• Contact information for the point-of-contact (POC) at the delivery location.</li> </ul>	<p>Section II: Resource Request Fields 6-11</p>
7	<p>Secure authorization for the request. The burden is on the requester, not the ordering point, to verify that the resource is required for the incident. Any request submitted without approval of the authorized personnel is subject to being returned immediately to the requester.</p> <p><b>Note:</b> Signature requirements vary by jurisdiction. Some jurisdictions require a handwritten signature while others will accept digital sign-off. In cases where a handwritten signature is needed, jurisdictions should consider</p>	<p>Section II: Resource Request Field 12</p>

Step	Description	Resource Request Form Reference
	<i>allowing digital authorization initially with handwritten signature provided at a later date.</i>	
8	<p>Submit the resource request.</p> <ul style="list-style-type: none"> <li>The <i>Resource Request Form</i>, or verbal resource requests providing all the information included on the form (with follow-up submittal of form with authorization signature), can typically be submitted to the EOC by any method (e.g., email, fax, information system). <ul style="list-style-type: none"> <li>Resource requesters should call the EOC after submittal to confirm receipt. This is particularly important in the early period of an incident as emergency resource ordering processes are being initiated.</li> </ul> </li> </ul>	N/A

### *Considerations for Regional Organizations and Special Purpose Agencies*

If a regional organization or special purpose agency submits an emergency resource request, the following considerations may apply:

- The organization or agency should submit orders for its system-wide needs via the city or county EOC in which its headquarters is located.
- For facility-specific needs, the regional organization or special purpose agency representing that facility should coordinate with the city EOC where the requesting-facility is located; if outside an incorporated area, the organization should coordinate with the county EOC.
- Fire-agencies may pass resource requests to a county fire defense board, which can obtain resources directly from the State Fire Marshal's Office.

# Resource Request Management Guide

This section of the *Handbook* provides detailed guidance on managing resource requests from the point they are received by the EOC to the point the resource is demobilized. The figure below illustrates the resource management process, including the three steps beyond the resource request step. The *Handbook* only includes information about the tasks and considerations in these later steps that relates to the resource request management process.

**Figure 5: Resource Management Process**



## Resource Request Management Core Functions

The following table includes information about resource tracking and financial processes that should be used throughout the resource request management process.

**Table 10: Resource Request Management Core Functions**

Function	Description
<b>Request and Resource Tracking</b>	<ul style="list-style-type: none"><li>• The Logistics Section maintains a system for processing and tracking resource requests.<ul style="list-style-type: none"><li>▪ Use <i>Appendix 1: Resource Request Form</i> and <i>Appendix 2: Resource Request Tracking Sheet</i> to track the resource request through the request management process.</li><li>▪ Share the information with the EOC Planning Section to track resources once they are deployed to the incident.</li></ul></li><li>• The Finance Section is responsible for tracking all resource time use during deployment, as well as cost procedures. This holds true for any resource, including mutual aid resources.</li></ul>
<b>Resource Brokering</b>	<ul style="list-style-type: none"><li>• For some requesters, the EOC Logistics Section may broker resources by identifying a provider and then directing the resource requester to initiate the order. The Logistics Section may assist with identifying potential resource providers and support arrangements between the resource requester and provider. The EOC Finance Section may work closely with the Logistics Section to identify cost and contract considerations.</li></ul>
<b>Procurement and Financial Tracking</b>	<ul style="list-style-type: none"><li>• The EOC Logistics and Finance sections must coordinate throughout the process to ensure that all procurement rules and financial tracking procedures are followed. Coordination is critical for disaster grant reimbursement and to ensure all costs are being accurately tracked and accounted (see <i>Emergency Resource Management Procurement</i> section).</li><li>• If the EOC will fulfill resource needs through contracting or procurement, the Finance Section is responsible for ordering these resources (see <i>Emergency Resource Management Procurement</i> section).</li></ul>

## Resource Request Identification and Processing

To prevent repeated requests for additional details and to support the rapid processing of requests, the EOC should require complete information on each request. While the resource requester should provide complete information, the resource request manager and staff from the EOC Operations Section and the EOC Logistics Section should examine each request that they receive and communicate with the resource requester to clearly understand the need.

### *Resource Request Priorities*

The resource request managers from the Operations Section will coordinate with the Logistics Section to establish a prioritization level to categorize resource requests. For example, a resource request may be categorized as high, medium, or low priority. Priority levels are assigned based on the incident priorities established by the Incident Commander or in the EOC by the incident action planning process, which will establish life-saving and other critical activities as the highest priorities. The EOC Director or section chiefs will communicate these priorities, and any additional guidance regarding fulfilling requests, to resource managers. The Logistics Section Chief, or the Planning Section Chief, as appropriate, will identify scarce resources and report them to the EOC Director and other section chiefs. If necessary, allocation priorities will be set by an EOC Policy Group or Multi-Agency Coordination (MAC) Group (see the *Regional Resource Request Management Coordination* section for information about Regional MAC Group coordination).

The resource request managers from the Operations Section, in coordination with the Logistics Section, will assign priorities, identified in the table below, to the resource request based on the information provided by the resource requester and the incident priorities. The EOC will typically fill resource requests on a first-come, first-served basis unless EOC leadership provides other guidance. If the resource request is forwarded to the state, the Logistics Section will align the priority level to the State of Oregon or the State of Washington priority guidance as appropriate.

**Table 11: Resource Priority Levels**

Priority Level	Description
<b>1. High</b>	The resource is mission-critical. A delay in provision of the resource is likely to cause the situation to worsen.
<b>2. Medium</b>	The resource is important. A delay in providing the resource may eventually cause the situation to worsen.
<b>3. Low</b>	The resource is needed to support routine needs in an ongoing operation. If there is a delay, the requester can get by in the short term.

## Request Management Process

The table below outlines the fundamental components of the resource request management process.

**Table 12: Resource Request Identification and Processing**

Step	Description	Resource Request Form Reference
1	<p>Resource requester submits the request to the Operations Section via telephone, email, information system, fax, or runner (see <i>Table 9: Resource Request Process and Resource Request Form References</i> in the <i>Resource Requester Guide</i> for more details).</p> <p><b>Note:</b> <i>If the request originates from the Planning Section or a Joint Information Center within the EOC, the requester should submit the request directly to the Logistics Section via telephone, email, information system, fax, or runner.</i></p>	N/A
2	<p>The Operations Section receives the request and resource request managers, or staff with resource management responsibilities:</p> <ul style="list-style-type: none"> <li>Validate the resource request is eligible for fulfillment through the EOC. Confirm that the: <ul style="list-style-type: none"> <li>Request is related to incident;</li> <li>Requester is unable to get the resource; and</li> <li>EOC should obtain the resource.</li> </ul> </li> <li>Verify the request has the proper authorization documentation.</li> <li>Contact the requester to: <ul style="list-style-type: none"> <li>Verify that the request is received;</li> <li>Identify any information that needs to be clarified; and</li> <li>Ensure all required fields are completed.</li> </ul> </li> </ul> <p><b>Note:</b> <i>If the EOC Operations Section detects a that a problem exists with the request, Operations personnel should contact the resource requester immediately to identify a solution and resubmit the request.</i></p>	<p>Section I: Request Information</p> <p>Section II: Resource Request</p>
3	<p>The Operations Section, in coordination with the Logistics Section as appropriate, determines the priority of the resource as outlined in <i>Table 11: Resource Priority Levels</i>.</p>	Section I: Request Information
4	<p>The Operations Section determines whether the requested resource is available from the departments or functions working within the Section.</p> <p>If the requested resource is not available through these sources, then the Operations Section forwards the request to the Logistics Section (see Steps 7 – 9 for Logistics and Finance Section responsibilities).</p>	N/A



Step	Description	Resource Request Form Reference
5	<p>As appropriate, the request manager from the Logistics or Operations sections should:</p> <ul style="list-style-type: none"> <li>• Maintain the status of the request (see <i>Table 13: Resource Request Status</i>).</li> <li>• Examine the request for opportunities to group requested resources if multiple similar resources are requested.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li>• <i>If the resource request manager detects that a problem exists with the request, personnel should contact the resource requester immediately to identify a solution and resubmit the request.</i></li> <li>• <i>If the request is rejected, the resource request manager should provide an immediate status update and a reason for the rejection.</i></li> <li>• <i>The Logistics Section should identify another source (e.g., county, Regional Logistics Support Team [RLST], or state) to fulfill.</i></li> </ul>	<p>Section I: Request Information</p> <p>Section II: Resource Request</p>
6	<p>The resource request manager should assign a tracking number that conforms to the EOC's tracking system and identify which agency or function has the lead for identifying a source.</p> <p>The resource request manager should track and document the action taken on the request. This can help document compliance with local procurement rules and support reimbursement. Additionally, the resource request manager should confirm and document the delivery instructions and estimated time of arrival.</p>	<p>Section I: Request Information</p> <p>Section III: Request Management Fields 13-14</p>
7	<p>If the Logistics Section has received the request from Operations Section, they should identify a source for the needed resource.</p> <ul style="list-style-type: none"> <li>• The Logistics Section should determine availability from the following sources (listed below in order of sourcing prioritization): <ul style="list-style-type: none"> <li>▪ Mutual aid channels within the PMR or with intrastate channels (see the Mutual Aid Channels section);</li> <li>▪ Volunteer organizations;</li> <li>▪ Private-sector sources (engage with Finance Section if procurement or contracting is needed to obtain source); and</li> <li>▪ Through the state or federal governments, via the state EOC.</li> </ul> </li> <li>• If the request is submitted to the State EOC, the Logistics Section should: <ul style="list-style-type: none"> <li>▪ Log the state tracking number;</li> <li>▪ Communicate status of this request to the requester; and</li> <li>▪ Communicate with the state at least once an operational period to determine the status of request.</li> </ul> </li> <li>• It may be necessary to fill requests from multiple sources. If this is the case, determine which of the sources described</li> </ul>	<p>Section III: Request Management Field 15</p>

Step	Description	Resource Request Form Reference
	<p>above will fill the request and collect information regarding the transaction type and the source's status with respect to filling the request.</p> <ul style="list-style-type: none"> <li>If the specified request is not immediately available and an alternative resource is identified based on the mission description, the Logistics Section <b>must</b> ask the requester to approve the alternate resource.</li> </ul> <p><b>Notes:</b></p> <ul style="list-style-type: none"> <li><i>It may be possible to group resources into a bulk order for a more efficient deployment of resources.</i></li> <li><i>Once a request is forwarded to a higher jurisdiction (e.g., city sends to county), that jurisdiction's Logistics Section may have direct contact with the requester regarding delivery instructions and estimated time of arrival.</i></li> </ul>	
8	<p>Logistics and Finance section personnel should reference the completed <i>Appendix 3: Incident Finance and Administration Worksheet</i> to determine spending limits, purchasing authorities, and other resource ordering decision points during an incident as described in the <i>Setting an Ordering Process</i> section.</p> <p><b>Note:</b> <i>Logistics and Finance sections should coordinate with the city or county's Risk Management department regarding insurance considerations.</i></p>	N/A
9	<p>The Logistics and Finance sections should work together to ensure all procurement rules and financial tracking procedures are followed and documented and to complete the financial payment information associated with the request:</p> <ul style="list-style-type: none"> <li>Determine if any provisions or rules exist specific to the transaction(s) to procure the resource (e.g. special conditions or limitations stipulated in the contract or purchase order);</li> <li>Obtain the Project Payment Code established by the Finance Section for the disaster; <ul style="list-style-type: none"> <li>Some organizations use different terminology for this item, such as a WBS (Work Breakdown Structure) code, T-code (Transaction code), or Project Outline Number;</li> </ul> </li> <li>Collect any purchase, contract reference, and financial tracking numbers specific to the resource request.</li> <li>Obtain a total cost estimate; and</li> <li>Obtain the cost breakdown if multiple sources are providing the resources.</li> </ul>	Section III: Request Management Fields 16-19

Step	Description	Resource Request Form Reference
10	<p>Maintain the Status Log on the <i>Resource Request Form</i> and on the <i>Resource Request Tracking Sheet</i> and communicate the status and the tracking number to the requester (see <i>Table 13: Resource Request Status</i>).</p> <p><b>Note:</b> The <i>Tracking Sheet</i> provides multiple lines to allow tracking for resources provided by multiple sources.</p>	Section I: Request Information

## Resource Request Status Communication

Communication between the resource requester, the resource request managers in the EOC Operations and Logistics sections, and the resource provider is critical to resource mobilization and to successfully meet the response mission. The resource request manager is responsible for communicating the resource request status to the requester when the status changes (as detailed in the table below) or once an operational period, at a minimum. 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.

**Table 13: Resource Request Status**

Status	Description
<b>New Request</b>	Request has been submitted. No other action has occurred.
<b>Assigned</b>	Request has been assigned to the EOC Operations or Logistics sections, but no further action has been taken.
<b>Brokered</b>	Requester has been directed to potential resource providers from whom they can obtain the resource needed directly.
<b>Partially Brokered</b>	Requester has been directed to potential resource providers from whom they can obtain part of the resource needed directly.
<b>Filled</b>	All resources needed to fill the request have been ordered. Source and delivery information is updated within the <i>Resource Request Tracking Sheet</i> .
<b>Partially Filled</b>	The order has been partially filled. Source and delivery information is updated within the <i>Resource Request Tracking Sheet</i> .
<b>Rejected/Unable to Fill</b>	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.
<b>Sent To</b>	The order has been forwarded to another entity (e.g., county, RLST, or state) for processing.
<b>Cancelled</b>	The resource requester has cancelled the request with the EOC Logistics Section before it received the resources.
<b>Closed</b>	The request has been processed and reviewed by the Finance Section. No further action is required.

## Resource Deployment, Tracking, and Demobilization

After the resource request is filled, the resource is deployed, assigned, and used on scene. The resource is then demobilized (if not fully consumed or disposed of) at the end of the incident or when it is no longer needed. While resource deployment and demobilization are not components of the resource request management process, an understanding of these processes, included in the table below, will improve the resource request management process. 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.

**Table 14: Resource Deployment and Demobilization**

Process	Description
<b>Resource Deployment</b>	<p>The Logistics Section should reference the <i>Resource Request Form</i> to determine where the resource is ultimately needed and the timeframe for delivery.</p> <p><b>Note:</b> <i>The receiving organization should inspect rented, leased, or borrowed equipment and document its condition before putting it into use. It should also be inspected before it is returned. Pictures are encouraged. Pre- and post-use inspection ensures that the equipment is safe for use and can also help determine liability for any damage.</i></p>
<b>Resource Tracking</b>	<p>EOC staff will take the following actions related to resource tracking.</p> <ul style="list-style-type: none"> <li>• The Logistics Section should use the <i>Resource Request Tracking Sheet</i> and the <i>Resource Request Form</i> to track resource deployment and share the information with the Planning Section staff to track resources once the resource has been received.</li> <li>• The Planning Section should use the <i>Resource Request Tracking Sheet</i> and the <i>Resource Request Form</i> (Section IV: Resource Use, Fields 20-21) to describe how the resource was used throughout its deployment: <ul style="list-style-type: none"> <li>▪ List the resource provider name and contact information;</li> <li>▪ Describe where, when, and how the resource was used as well as what needs the resource met/why it was used; and</li> <li>▪ Include the associated operator for any equipment. Equipment includes hand-held equipment such as chain saws.</li> </ul> </li> </ul> <p><b>Note:</b> <i>This section of the Resource Request Form and Resource Request Tracking Sheet should be updated with multiple entries to describe how the resource is used throughout its deployment. The number and frequency of the updates depends on multiple factors (e.g., if the resource is used for different purposes or at various locations).</i></p>
<b>Resource Demobilization</b>	<p>EOC staff will take the following actions related to resource demobilization.</p> <ul style="list-style-type: none"> <li>• While processing a resource request, the Logistics Section should confirm that all source information related to the resource is accurately identified on the <i>Resource Request Form</i>, and the <i>Resource Request Tracking Sheet</i>, to ensure an efficient demobilization process.</li> <li>• The Planning Section (Demobilization Unit Leader, if established) generally coordinates demobilization planning.</li> <li>• The Planning Section should update the <i>Resource Request Form</i> (Section V: Asset Disposition, Fields 22-25) to describe if the item has been returned, consumed, or kept to be used again:</li> </ul>

Process	Description
	<ul style="list-style-type: none"> <li>▪ Describe where, when, and who received the resource; and</li> <li>▪ Include any specific requirements regarding the return of the resource.</li> <li>• The Logistics Section should describe the condition of the resource upon its return (Field 26). If damaged, describe the type of damage in detail.</li> </ul>

## Regional Resource Request Management Coordination

If the scope of the disaster grows in impact, geographic scale, or complexity, there may be the need for regional coordination and support. An impacted county may need resources that are available from other counties in the region. Counties in the region may also need to coordinate to determine how they prioritize and allocate scarce resources across the region. To request resources from other counties in the region, a county EOC may simply request resources directly from another county EOC, from the county emergency management agency, or directly from an entity within that county. Involvement of the county EOC or the county emergency management agency will ensure proper coordination.

Impacted county EOCs may also call upon two regional emergency support organizations, the Multi-Agency Coordination (MAC) Group and the Regional Logistical Support Team (RLST) to support their resource management missions.

The RLST and the MAC Group allow for greater coordination and situation awareness on resource needs and availability. These regional structures may be activated, if appropriate, to enable the five-county region to work together and jointly coordinate resource management and logistics efforts.

The RLST and the MAC Group can be activated independently.

- Emergency incidents that are smaller do not require the RLST or MAC Group to enable communication and coordination between the impacted jurisdiction and regional counties.
- During large incidents (e.g., impacting three or more counties), staff needed to support the RLST may not be available if they are supporting their own county operations.

## Regional Resource Management and Logistics Coordination Organization

The following table outlines the roles of these support organizations and the counties related to resource management within the PMR.

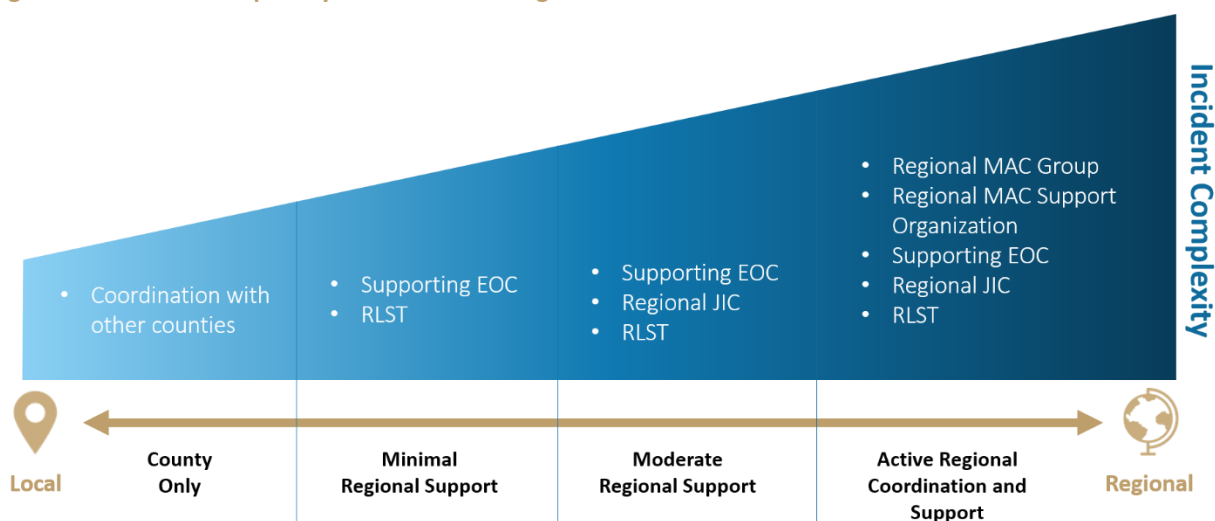
**Table 15: Regional Coordination Organization Components**

Organization	Description
<b>County EOCs</b>	<p>The impacted county should retain full responsibility and authority for incident support and coordination. The county EOC:</p> <ul style="list-style-type: none"><li>• Maintains the prime responsibility for visibility on local response operations and resources; and</li><li>• Coordinates information and resources for on-scene operations.</li></ul>
<b>RLST</b>	<p>The RLST is a specialized team that supports one or more impacted EOCs by coordinating resource requests from other PMR agencies. The RLST is designed to be scalable to meet the needs of an impacted or supporting EOC. The RLST:</p> <ul style="list-style-type: none"><li>• Deploys upon the request from a county;</li><li>• Supplements resource ordering systems within the PMR; and</li><li>• Assists the Logistics Section with resource acquisitions.</li></ul>

Organization	Description
	<p>A county EOC that chooses to use RLST services should establish a logistics directive for the RLST. The directive should define:</p> <ul style="list-style-type: none"> <li>• Services the RLST is requested and authorized to provide;</li> <li>• Terms of authorization to either broker or order resources on the county's behalf;</li> <li>• Whether the RLST is authorized to request resources directly from the state; and</li> <li>• Direction for reporting to the Regional MAC Group regarding competing needs for scarce resources.</li> </ul>
<b>Regional MAC Group</b>	<p>The MAC Group should consist of senior executive county representatives from the PMR. Membership of the MAC Group should be based on the disaster and the skills and expertise needed to respond. The MAC Group:</p> <ul style="list-style-type: none"> <li>• Provides coordinated decision making and scarce resource allocation;</li> <li>• May establish priorities among incidents, as well as harmonize organization policies; and</li> <li>• Provides strategic guidance and direction to support incident management activities.</li> </ul>
<b>Regional MAC Support Organization</b>	<p>The MAC Group Support Organization supports the MAC Group to ensure they have the information to operate efficiently and effectively. The MAC Group Support Organization:</p> <ul style="list-style-type: none"> <li>• Assists the MAC Group with key information and coordination elements, including situation status, resource status, internal logistics, communications systems integration, technical expertise, information sharing, and public information; and</li> <li>• Maintains a regional common operating picture.</li> </ul>

The following figure illustrates how regional support elements may be employed as the complexity of the incident grows.

**Figure 6: Incident Complexity and Potential Regional Elements**

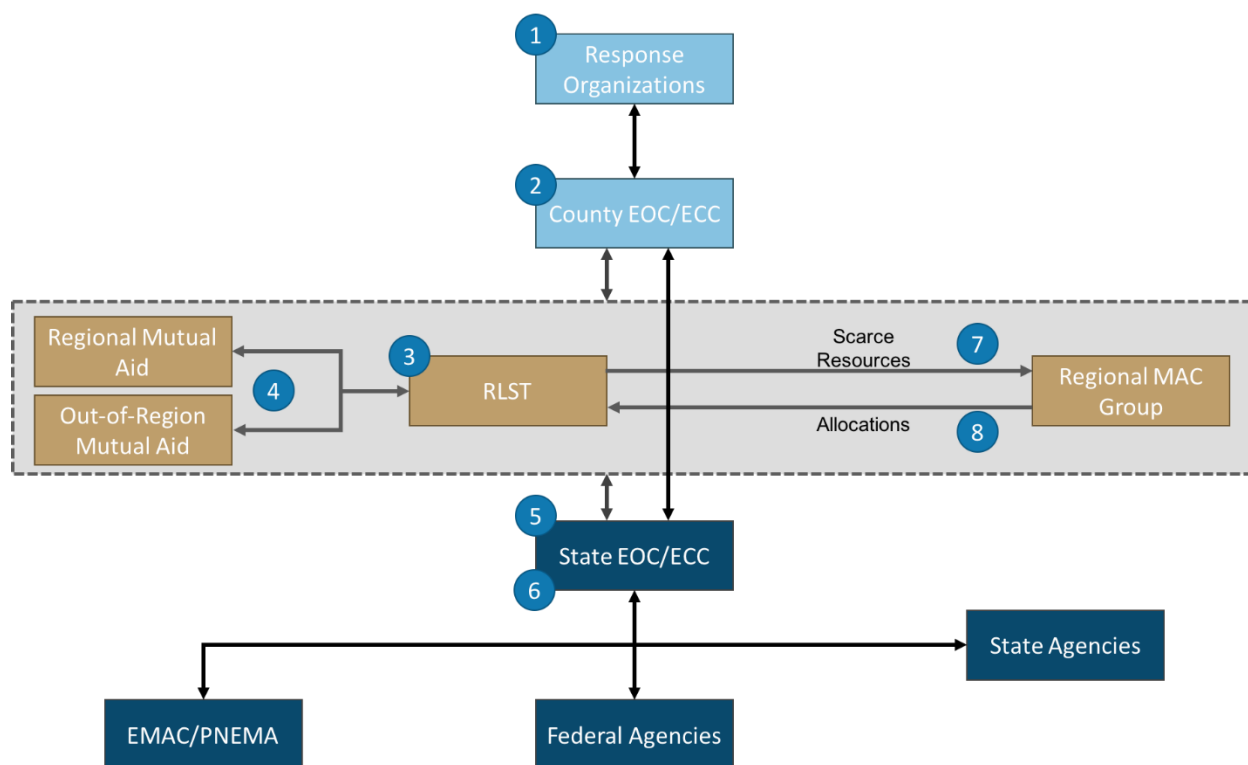


Full information on the roles and operations of these groups can be found in the *Portland Metropolitan Region’s Multi-Agency Coordination System Concept of Operations Plan, October 2017* and the *2015 Regional MAC Group and Support Organization Handbook*.

## Regional Resource Request Management

The following figure and table provide detail on the regional resource request management process once the regional support systems described above are activated. Utilizing the RLST is a recommended practice for counties needing substantial resources from around the PMR or needing extra assistance in processing resource requests. Counties with sufficient personnel to handle the scope of resource requests on their own may not need support from the RLST. RLST members come from agencies and organizations across the PMR; therefore, during a large-scale incident (involving three or more of the five-county region), it is unlikely that the RLST will activate since RLST members will need to support their home agencies or organizations. The RLST and the MAC group can be activated independently.

**Figure 7: Regional Resource Request Management Process**



**Table 16: Regional Resource Request Management Process**

Step	Description
1	Response organizations should place resource requests to their respective city or county EOC using <i>Appendix 1: Resource Request Form</i> and the process in the <i>Resource Requester Guide</i> section.
2	The city or county EOC should fill the requests from internal sources or through procurement (see the <i>Resource Request Management Guide</i> section). City EOCs should send requests to their county EOCs.



Step	Description
3	The county EOC should send requests that cannot be filled with county resources or procurement to the RLST (if activated).
4	The RLST, if activated, requests resources from other agencies in the PMR. They may also request resources from agencies outside the PMR, if authorized.
5	<p>The RLST, if activated, notifies the requesting county about any unfilled orders. The following options may be pursued:</p> <ul style="list-style-type: none"> <li>• If the RLST has been authorized by the requesting county to do so, the RLST may send the request to the state.</li> <li>• The county's EOC may place the order directly to the state.</li> </ul>
6	The state EOC triages and, if appropriate, approves the order before tasking a state agency to fill the order; seeks the resource via mutual aid (e.g., Emergency Management Assistance Contract [EMAC], Pacific Northwest Emergency Management Arrangement [PNEMA]); or submits a request to the appropriate federal agency.
7	If multiple county EOCs are requesting a resource that cannot be entirely filled for the next operational period, the Regional MAC Support Organization identifies the resource as scarce.
8	<p>The MAC Group allocates the scarce resources and returns the allocation list to the impacted county EOCs.</p> <ul style="list-style-type: none"> <li>• In Oregon: <ul style="list-style-type: none"> <li>▪ The Regional MAC Group should initiate incident prioritization at this time utilizing the <i>Regional MAC Group and Support Organization Handbook (2015): Appendix 2—Regional Incident Prioritization Worksheet</i>.</li> <li>▪ When incidents have been prioritized, resources should be allocated based on the criteria established by the MAC Group for the incident.</li> </ul> </li> <li>• In Washington: <ul style="list-style-type: none"> <li>▪ When Clark County needs a scarce resource, the order should be forwarded to the Clark Regional MAC Group.</li> <li>▪ If needed, the request should be forwarded to the Washington State Emergency Management Department for fulfillment and prioritization.</li> <li>▪ Involvement from the Regional MAC Group is not necessary for scarce resource requests from Clark County.</li> </ul> </li> </ul>

## Regional Coordination Communication

When multiple counties within the region are providing resources to an incident, a coordination call may become beneficial to ensure timely and comprehensive information sharing. An impacted county EOC Logistics Section will determine the need for the coordination call and send out an invitation and agenda to the supporting counties and entities in the region and the RLST (if activated). The following table includes the agenda items for a coordination call to ensure effective communication and coordination. A template of the agenda is included in *Appendix 5: Regional Coordination Call Agenda*. The EOC Logistics Section determining the need for the call will determine the potential to combine conference call agendas.

**Table 17: Regional Coordination Call Agenda Components**

<b>Agenda Item</b>	<b>Description</b>
<b>Situation and Support Requirements</b>	<p>Determine ongoing actions, responses, and support requirements.</p> <ul style="list-style-type: none"> <li>Each county on the call provides a briefing of the actions occurring around the region.</li> </ul>
<b>Resource Need Determination</b>	<p>Determine the type and extent of resources needed to support the emergency.</p> <ul style="list-style-type: none"> <li>Identify resource requests that cannot be filled within each county.</li> <li>Identify areas where additional support may be needed and potential sources for support.</li> </ul>
<b>Regional Resources</b>	<p>Identify resources in the region that can be applied to any anticipated or arising shortfalls.</p> <ul style="list-style-type: none"> <li>Identify regional availability of needed resources to satisfy outstanding requests and support potential areas of need.</li> <li>Discuss alternate resources to meet needs.</li> </ul>
<b>Resource Request Process</b>	<p>Coordinate the process to request identified regional resources.</p> <ul style="list-style-type: none"> <li>Review the regional resource process.</li> <li>Identify any considerations from the RLST or MAC Group specific to the disaster.</li> </ul>
<b>Next Steps</b>	<p>Identify next steps and considerations for the next call.</p>

## Mutual Aid Channels

The following mutual aid channels are available to the organizations within the PMR. This table provides information about each of these channels, including the purpose of the mutual aid agreement, the coordinating agency, the organizations that are eligible for mutual aid, the resources available through mutual aid, and any special provisions or requirements.

These are the primary mutual aid agreements that are applicable to multiple jurisdictions in the PMR. Other intra-county mutual aid agreements may exist at the local level, such as fire/EMS agency agreements and public works agency resource sharing agreements.

**Table 18: Mutual Aid Channels**

### Mutual Aid Channel and Description

#### Cooperative Public Agencies of Washington County (CPAWC)

<b>Purpose</b>	Facilitates cost-effective, efficient and cooperative use of public resources which may be useful to signatory parties for public works construction, operations, maintenance, and related activities.
<b>Coordinating Agency</b>	CPAWC Organization
<b>Eligible Organizations in the PMR</b>	Current members include Beaverton School District, Boring Water District, City of Banks, City of Beaverton, City of Cornelius, City of Forest Grove, City of Gaston, City of Gladstone, City of Gresham, City of Hillsboro, City of Lake Oswego, City of North Plains, City of Sherwood, City of Tigard, City of Tualatin, City of Wilsonville, Clean Water Services, Columbia County, Hillsboro School District 1J, Oak Lodge Water District, Oregon Department of Transportation, Raleigh Water District, Rivergrove Water District, Sunrise Water Authority, Tigard Tualatin School District, Tualatin Hills Parks and Recreation District, Tualatin Valley Fire and Rescue, Tualatin Valley Water District, Washington County, West Slope Water District
<b>Available Resources</b>	Resources include vehicles, equipment, machinery, and related items and services.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>Equipment shall be provided upon reasonable request at mutually convenient times and locations; however, the responding party may refuse the request if it determines in good faith that responding is not in its best interest.</li> <li>Signatories provide equipment storage space to each other, at no charge, upon request, when mutually convenient.</li> <li>The responding party may require that the equipment it provides be operated only by responding party personnel.</li> <li>The requesting party shall perform written maintenance checks prior to and after use and shall provide routine daily maintenance of equipment during the period in which the equipment is in user's possession. The requesting party shall not, however, be responsible for scheduled maintenance or repairs.</li> <li>The requesting party must reimburse the responding party for equipment and services based on the rates used for the requesting party's internal financial management of personnel and equipment. These rates are included in the Equipment Sharing Catalog. Supplies will be charged at the responding party's invoice cost, plus 15%, or may be replaced by the requesting party.</li> </ul>

## Mutual Aid Channel and Description

	<ul style="list-style-type: none"> <li>On May 15 of each year, all parties will each total all reimbursement for equipment and personnel. Reimbursement must be paid within thirty (30) days of billing and payment for any monetary difference may be billed at that time to any or all responding parties.</li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>Agreement homepage: <a href="http://www.cpawc.org/index.cfm">http://www.cpawc.org/index.cfm</a></li> <li>Link to agreement: <a href="http://www.cpawc.org/docs/intergovernmental_agreement_doc.pdf">http://www.cpawc.org/docs/intergovernmental_agreement_doc.pdf</a></li> </ul>

## Emergency Management Assistance Compact (EMAC)

<b>Purpose</b>	Offers state-to-state assistance during Governor-declared states of emergency. The State EOC may request resources through EMAC if resources cannot be provided by state agencies or other jurisdictions within the state.
<b>Coordinating Agency</b>	<ul style="list-style-type: none"> <li>Oregon Office of Emergency Management</li> <li>Washington State Emergency Management Division</li> </ul>
<b>Eligible Organizations in the PMR</b>	Oregon and Washington states
<b>Available Resources</b>	<ul style="list-style-type: none"> <li>EMAC resources may include any capabilities that one member state possesses that can be shared with another member state.</li> <li>Resources include, but are not limited to, emergency operations center support, disaster recovery, security, fire-fighting, law enforcement, medical personnel and resources, public utilities management, public health, GIS support, engineering, transportation, and community outreach.</li> <li>Unless other arrangements are in place, EMAC will likely be required when sharing resources between Clark County, Washington and the other PMR counties.</li> </ul>
<b>Provisions</b>	<ul style="list-style-type: none"> <li>The impacted state's governor must declare an emergency. The state's EMAC Authorized Representative or EMAC Designated Contact should open an event in the online EMAC Operations System, alerting both the National Coordinating State and the National Emergency Management Association (NEMA) that a request for resources is likely.</li> <li>The Requesting State is responsible for reimbursing the Assisting State for resources requested through EMAC. <ul style="list-style-type: none"> <li>Most expenses during deployment are reimbursable, including personnel, travel, equipment, and commodities. Workers' compensation is not reimbursable.</li> <li>The requesting state is responsible for reimbursement regardless of whether an incident is a federally-declared disaster.</li> <li>In Oregon, the local jurisdiction within the Requesting State is held accountable for the costs associated with the resource being requested through EMAC, until reimbursement is received from the Requesting State.</li> </ul> </li> <li>Resources provided through EMAC are placed under the direction of the Incident Commander or local government within the Requesting State.</li> <li>The Requesting State EOC works with the requesting local government to coordinate the delivery and pick-up of the resources.</li> </ul>

## Mutual Aid Channel and Description

	<ul style="list-style-type: none"> <li>EMAC includes provisions for reimbursement rates, operational management, request processes, and mission-ready packages.</li> <li>A local government wishing to provide resources through EMAC must enter into an agreement with their home state.</li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>Agreement homepage: <a href="https://www.emacweb.org/">https://www.emacweb.org/</a></li> <li>General information: <a href="https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-intro-thru-reimbursement_dec2016.pdf">https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-intro-thru-reimbursement_dec2016.pdf</a></li> <li>Operations manual: <a href="https://mil.wa.gov/uploads/pdf/LogisticsResources2/EMACOperationsManual2013.pdf">https://mil.wa.gov/uploads/pdf/LogisticsResources2/EMACOperationsManual2013.pdf</a></li> <li>Link to agreement (OR): <a href="https://www.oregonlaws.org/ors/402.105">https://www.oregonlaws.org/ors/402.105</a></li> <li>Link to agreement (WA): <a href="https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-pnema-iga---final.pdf">https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-pnema-iga---final.pdf</a></li> </ul>

## Hospital/Health System Facility Emergency Mutual Aid Memorandum of Understanding (2015)

	<p>A voluntary agreement among the hospital/health system facilities within Northwest Oregon Healthcare Preparedness Region 1 (and Southwest Washington) for the purpose of:</p> <ol style="list-style-type: none"> <li>Coordinating emergency planning;</li> <li>Preparing for a coordinated health sector response to large-scale emergencies;</li> <li>Facilitating communications; and</li> <li>Providing mutual aid at the time of a medical disaster.</li> </ol>		
<b>Purpose</b>			
<b>Coordinating Agency</b>	Northwest Oregon Health Preparedness Organization		
<b>Eligible Organizations in the PMR</b>	<p>Within PMR:</p> <ul style="list-style-type: none"> <li>Adventist Medical Center</li> <li>Cedar Hills Hospital</li> <li>Columbia Memorial Hospital</li> <li>Kaiser Permanente</li> <li>Legacy Health</li> <li>OHSU</li> </ul>	<p>Outside of PMR:</p> <ul style="list-style-type: none"> <li>Providence Health &amp; Services</li> <li>Shriners Hospital for Children</li> <li>Tuality Healthcare</li> <li>Vibra Specialty Hospital of Portland</li> </ul>	<ul style="list-style-type: none"> <li>Tillamook Regional Medical Center</li> </ul>
<b>Available Resources</b>	<ul style="list-style-type: none"> <li>Resources include personnel, pharmaceuticals, supplies, and equipment.</li> <li>Includes provisions for the transfer or evacuation of patients.</li> </ul>		
<b>Provisions</b>	<ul style="list-style-type: none"> <li>If only one hospital or facility is impacted, any administrator may initiate the request. If multiple hospitals or facilities are impacted, requests must be made by Hospital Incident Command System staff.</li> <li>Requests for pharmaceuticals, supplies, equipment and/or personnel must be made to hospital administration at the resource-transferring facility.</li> <li>Reimbursement is due within sixty (60) days of receiving an invoice from the resource-transferring facility.</li> <li>Includes provisions for communication protocols and verification of assisting personnel qualifications.</li> </ul>		
<b>More Information</b>	Link to agreement: <a href="https://multco.us/file/62842/download">https://multco.us/file/62842/download</a>		

## Mutual Aid Channel and Description

### Intergovernmental Agreement for Sharing EOC Personnel

<b>Purpose</b>	An intergovernmental agreement between agencies in the greater PMR that authorizes, facilitates, and establishes conditions and provisions for the sharing of qualified EOC personnel amongst the parties during emergencies where transportation routes are disrupted and EOC personnel are unable to report to their normal work locations.
<b>Coordinating Agency</b>	Regional Disaster Preparedness Organization
<b>Eligible Organizations in the PMR</b>	All signatory counties and cities, inter-local agencies, regional governments, and special districts within Clackamas, Columbia, Multnomah, and Washington counties in Oregon and Clark County in Washington
<b>Available Resources</b>	Party agency employees and qualified emergency service volunteers responsible for various activities occurring within an EOC. These personnel may be full-time emergency management personnel or other personnel from the assisting agency, or qualified emergency service volunteers who augment the EOC during emergencies and are trained to local standards.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>■ The Emergency Program Manager in each jurisdiction will develop, maintain, and publish a current roster of approved EOC personnel, paid and volunteer.</li> <li>■ The lending organization shall be solely responsible for payment of its employees' wages, any required payroll taxes, and any benefits or other compensation. <ul style="list-style-type: none"> <li>■ The lending organization is authorized to invoice the borrowing organization for the total costs of loaned employees for all time beyond the first twelve (12) hours.</li> <li>■ The borrowing organization must repay the lending organization within sixty (60) days of receipt of the invoice.</li> </ul> </li> <li>■ The borrowing organization is responsible for making arrangements, as necessary, to provide and pay for the safety, housing, meals, and transportation to and from job/housing sites for loaned EOC personnel.</li> </ul>
<b>More Information</b>	Link to agreement: <a href="https://www.portlandoregon.gov/rdpo/article/590311">https://www.portlandoregon.gov/rdpo/article/590311</a>

### Managing Oregon Resources Efficiently (MORE) Intergovernmental Agreement (2013)

<b>Purpose</b>	Provides rules for sharing equipment and materials among public entities.
<b>Coordinating Agency</b>	Marion County, Oregon
<b>Eligible Organizations in the PMR</b>	Columbia, Clackamas, Multnomah, and Washington counties; most major cities within these counties
<b>Available Resources</b>	Resources include equipment, materials, and services that may be useful in performing public works, transportation, engineering, construction, operations, maintenance, service district, or emergency management activities.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>■ For routine as well as emergency needs.</li> <li>■ No emergency declaration required.</li> <li>■ Invoices must be paid within 30 days.</li> <li>■ Provider can require that equipment and materials are operated by their personnel.</li> </ul>

## Mutual Aid Channel and Description

<b>More Information</b>	<ul style="list-style-type: none"> <li>Agreement homepage: <a href="http://www.MOREoregon.com">http://www.MOREoregon.com</a></li> <li>General information: <a href="http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf">http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf</a></li> <li>Link to agreement: <a href="http://www.co.marion.or.us/PW/Roads/MORE/Documents/moreiga.pdf">www.co.marion.or.us/PW/Roads/MORE/Documents/moreiga.pdf</a></li> </ul>
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### Master Interlocal Mutual Aid Agreement - Law Enforcement Assistance Agreement (2013)

<b>Purpose</b>	Supports the provision of mutual aid among law enforcement agencies within Oregon and Washington and between the two states.
<b>Coordinating Agency</b>	Local law enforcement agencies
<b>Eligible Organizations in the PMR</b>	Law enforcement agencies in Clackamas, Columbia, Multnomah, and Washington counties in Oregon, and in Clark and Skamania counties in Washington
<b>Available Resources</b>	Parties responding to a request will commit law enforcement personnel, equipment, resources, and supplies. This includes support for major incidents, pursuits, and investigations.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>Authorizes a chief law enforcement officer to request law enforcement assistance from other agencies.</li> <li>Includes provisions for cross-commissioning full time and state certified officers; provisions for cross-jurisdictional exercise of authority; and provisions for command and control over assisting personnel.</li> <li>Each party bears its own expenses for assistance provided during a major event (i.e., an event which may exceed the capacity of the requesting party to adequately respond). <ul style="list-style-type: none"> <li>The agreement includes provisions for compensation for assistance provided during a non-major event.</li> </ul> </li> </ul>

### (Oregon) Inter-County Omnibus Mutual Aid Agreement (2010)

<b>Purpose</b>	Enables counties within Oregon to provide emergency assistance to each other during an emergency.
<b>Coordinating Agency</b>	Oregon county emergency management agencies
<b>Eligible Organizations in the PMR</b>	Clackamas, Columbia, Multnomah, and Washington counties
<b>Available Resources</b>	Emergency assistance includes personnel, services, equipment, materials, and/or supplies used to provide or restore county government services.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>Emergencies include, but are not limited to, human-caused or natural events such as fire, explosion, flood, severe weather, drought, earthquake, volcanic activity, spills or releases of hazardous materials, contamination, utility or transportation emergencies, disease, infestation, civil disturbance, riots, acts of terrorism or sabotage, and use of weapons of mass destruction.</li> <li>No emergency declaration is required.</li> <li>Assistance requests are submitted to the county emergency program manager, who serves as the administrator of the agreement for their county.</li> </ul>

## Mutual Aid Channel and Description

	<ul style="list-style-type: none"> <li>The first twelve (12) hours of equipment and personnel use will be without cost to the borrower. After the first twelve (12) hours, the cost to the borrower is the lender's actual costs.</li> <li>Only applies to signatory counties (cities and other agencies are not eligible).</li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>General information: <a href="http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf">http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf</a></li> <li>Link to agreement: <a href="http://www.ocem.org/docs/Inter-County%20MAA%202010%20Rev%20Final.pdf">http://www.ocem.org/docs/Inter-County%20MAA 2010%20Rev Final.pdf</a></li> </ul>

### Oregon Intrastate Mutual Assistance Compact (ORS 402.200) (a.k.a. Oregon Resource Coordination Assistance Agreement)

<b>Purpose</b>	Provides a channel and framework for state agencies and local and tribal governments to request and provide resources to one another for emergencies, trainings, and exercises.
<b>Coordinating Agency</b>	Oregon Office of Emergency Management
<b>Eligible Organizations in the PMR</b>	State of Oregon and all Oregon counties and cities; tribes may opt in
<b>Available Resources</b>	Resources include employees, services, equipment, and supplies.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>A request for assistance must be made by or through the presiding officer of the governing body of a requesting local government or the chief executive officer or designee of the requesting local government. The request may be made in writing or verbally, supported by written confirmation within thirty (30) days. <ul style="list-style-type: none"> <li>Any request for reimbursement must be made and agreed to in writing prior resource provision by the responding local government.</li> </ul> </li> <li>The resources of a responding local government are under the command and control of the requesting local government.</li> <li>Responding personnel and resources will be utilized under the standard operating procedures, medical and other protocols, and rating procedures used by the responding local government.</li> </ul>
<b>More Information</b>	Link to agreement: <a href="https://www.oregonlegislature.gov/bills_laws/ors/ors402.html">https://www.oregonlegislature.gov/bills_laws/ors/ors402.html</a>

### Oregon Public Works Emergency Response Cooperative Assistance Agreement

<b>Purpose</b>	A voluntary agreement in which signatories to the agreement are responsible for the construction and maintenance of public works facilities such as streets, roads, highways, sewer, water and related systems during routine and emergency conditions.
<b>Coordinating Agency</b>	Oregon Department of Transportation
<b>Eligible Organizations in the PMR</b>	<ul style="list-style-type: none"> <li>Clackamas, Columbia, Multnomah, and Washington counties</li> <li>Multnomah County Drainage District</li> <li>Oregon Department of Agriculture</li> <li>Oregon Department of Transportation</li> <li>Oregon Parks &amp; Recreation</li> </ul>



## Mutual Aid Channel and Description

	<ul style="list-style-type: none"> <li>Cities of Canby, Damascus, Estacada, Gladstone, Happy Valley, Johnson City, Lake Oswego, Milwaukie, Molalla, Oregon City, Sandy, West Linn, Wilsonville, Clatskanie, Columbia City, Rainier, St. Helens, Vernonia, Fairview, Gresham, Portland, Troutdale, Wood Village, Banks, Cornelius, Durham, Gaston, Hillsboro, North Plains, Sherwood, Tigard</li> </ul>
<b>Available Resources</b>	Personnel and equipment that can be utilized for the construction or maintenance of public facilities such as street, road, highway, sewer, water, and related systems during routine and emergency conditions.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>The responding organization's personnel and equipment shall be under the immediate control of that organization's supervisor. This supervisor reports to the requester's assigned incident commander.</li> <li>Agencies funded with road funds are limited to providing assistive services for road activities; sewer funds are limited to providing assistive services for sewer activities, and so on.</li> <li>The responding organization will be reimbursed for labor, equipment, materials, and other applicable expenses at its usual rates, within thirty (30) days of invoice receipt. <ul style="list-style-type: none"> <li>Workers' compensation is not reimbursable.</li> <li>Materials may be replaced in lieu of cash payment if agreed upon by the responding organization.</li> </ul> </li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>General information: <a href="http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf">http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf</a></li> <li>Link to agreement: <a href="https://services.oregon.gov/ODOT/Maintenance/Documents/public%20works%20agreement%20with%20signature.pdf">https://services.oregon.gov/ODOT/Maintenance/Documents/public%20works%20agreement%20with%20signature.pdf</a></li> <li>List of signatories: <a href="http://www.oregon.gov/ODOT/Maintenance/Documents/pwma_members.%20.pdf">http://www.oregon.gov/ODOT/Maintenance/Documents/pwma_members.%20.pdf</a></li> </ul>

## Oregon State Fire Service Mobilization Plan (2017)

<b>Purpose</b>	All-hazards plan used to mobilize fire resources to any incident beyond local fire service capabilities that are necessary to protect life, property, and the environment.
<b>Coordinating Agency</b>	Oregon State Police—Oregon Office of the State Fire Marshal
<b>Eligible Organizations in the PMR</b>	Fire agencies
<b>Available Resources</b>	Fire suppression resources which may be mobilized include those of county, city, and rural fire protection districts, as well as private fire departments and any other resources available through area mutual aid agreements.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>The state pays all costs only when the governor invokes the Conflagration Act.</li> <li>The plan may also be activated from an emergency declaration.</li> <li>State funding is only allocated for wildfires. All-risk incidents may not be eligible for state funding.</li> <li>The responsible fire chief requests assistance from their county fire defense board chief. The fire defense board chief requests assistance from the State Fire Marshal. The Fire Marshal may request that the Governor invoke the Conflagration Act. <ul style="list-style-type: none"> <li>The county fire defense board chiefs respond to requests.</li> </ul> </li> </ul>

## Mutual Aid Channel and Description

- The plan includes policies and procedures for activation, notification, requesting and sending resources, resource management, and reimbursement. Also includes equipment rates and training standards.

### More Information

Link to plan: [http://www.oregon.gov/osp/SFM/docs/2017\\_MobPlanFinal.pdf](http://www.oregon.gov/osp/SFM/docs/2017_MobPlanFinal.pdf)

## Oregon Water/Wastewater Agency Response Network (ORWARN)

### Purpose

Composed of member utilities providing voluntary assistance to each other during an emergency incident.

### Coordinating Agency

ORWARN Organization

### Eligible Organizations in the PMR

Oregon state water and wastewater agencies, including private utilities

### Available Resources

Resources include personnel, equipment, and materials that are required to restore critical operations to water and wastewater utilities that have sustained damages from natural or man-made emergency events.

### Provisions

- No emergency declaration is required.
- Requests are made by an authorized official of one member organization to another member organization, either in writing or verbally (supported by written confirmation as soon as possible).
- Responding personnel remain under the control of the responding organization.
- Food and shelter for responding personnel should be provided by the requesting organization when possible; if not possible, the costs which the responding organization incurs for food and shelter must not exceed the State per diem rate for that area (unless the responding organization can demonstrate that excess costs are necessary).
- The requesting organization will provide responding personnel with radio equipment (or radio frequency information if provided by the responding organization).
- Responding organizations must keep accurate records of work performed, including personnel hours, equipment, and supplies.
- The responding organization must supply the requesting organization with an itemized bill within ninety (90) days of the conclusion of the response.
  - Reimbursement is due forty-five (45) days after the billing date.
  - Personnel, equipment, materials, and supplies are all reimbursable.

### More Information

Link to agreement: [http://orwarn.org/files/OrWARN%20Agreement%20modified%20April%202009%20\(Indemnity\).pdf](http://orwarn.org/files/OrWARN%20Agreement%20modified%20April%202009%20(Indemnity).pdf)

## Pacific Northwest Emergency Management Arrangement (PNEMA)

### Purpose

An inter-governmental agreement between Oregon, Washington, Alaska, Idaho, British Columbia, and the Yukon Territories to provide a framework for cooperation, information sharing, and coordination of resources and support during emergencies.

### Coordinating Agency

- Oregon Office of Emergency Management
- Washington State Emergency Management Division

## Mutual Aid Channel and Description

<b>Eligible Organizations in the PMR</b>	Oregon and Washington states
<b>Available Resources</b>	<ul style="list-style-type: none"> <li>Assistance includes any resources on hand or available from any other source that are essential to the safety, care, and welfare of the people in the event of any emergency or disaster.</li> <li>Each signatory will use its best efforts to ensure that the citizens or residents of any other signatory present in its territory are provided emergency health services and emergency social services.</li> </ul>
<b>Provisions</b>	<ul style="list-style-type: none"> <li>No emergency declaration is required.</li> <li>The authorized representative of a signatory requests the assistance of another signatory by contacting its authorized representative, either in writing or verbally (supported by written confirmation within fifteen (15) days).</li> <li>Responding personnel continue under the command and control of their regular leaders, but the organizational units come under the operational control of the emergency services authorities of the signatory receiving assistance.</li> <li>Most expenses during deployment are reimbursable, including personnel, travel, equipment, and commodities. <ul style="list-style-type: none"> <li>Workers' compensation is not reimbursable.</li> </ul> </li> <li>Signatories may request exemption of others' laws that impede emergency measures.</li> <li>The Arrangement does not permit use of National Guard resources.</li> <li>Signatories will avoid levying taxes or fees on mutual aid activities.</li> <li>Signatories will review and exchange their respective contact lists, warning and notification plans, and selected emergency plans.</li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>Operations manual: <a href="https://mil.wa.gov/uploads/pdf/LogisticsResources2/pnema--ops-manual-and-sop-2016.pdf">https://mil.wa.gov/uploads/pdf/LogisticsResources2/pnema--ops-manual-and-sop-2016.pdf</a></li> <li>Link to agreement (OR): <a href="https://www.oregonlegislature.gov/bills_laws/ors/ors402.html">https://www.oregonlegislature.gov/bills_laws/ors/ors402.html</a></li> <li>Link to agreement (WA): <a href="https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-pnema-iga---final.pdf">https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-pnema-iga---final.pdf</a></li> <li>Link to agreement (Federal): <a href="http://uscode.house.gov/statutes/pl/105/381.pdf">http://uscode.house.gov/statutes/pl/105/381.pdf</a></li> </ul>

## Pacific Northwest Interagency Cooperative Intergovernmental Agreement for Grounds Equipment and Maintenance (GEM)

<b>Purpose</b>	Facilitates resource sharing to promote efficiency in the maintenance and operations of grounds, equipment, and roads and streets.
<b>Coordinating Agency</b>	GEM Organization
<b>Eligible Organizations in the PMR</b>	<ul style="list-style-type: none"> <li>Any general purpose governmental jurisdiction and public service provider may join</li> <li>Current signatories include Battle Ground School District, Camas School District, City of Battle Ground, City of Camas, City of Gresham, City of Kalama, City of Kelso, City of La Center, City of Lake Stevens, City of Longview, City of North Bonneville, City of Olympia, City of Portland, City of Portland - Bureau of Transportation, City of Ridgefield, City of Stevenson, City of Vancouver, City of Washougal, Clark County Department of Corrections, Clark County Fire District #5, Clark County Fire District #6, Clark County Public Works, Clark County Sheriff, Clark County Weed Management, Clark Public Utilities, Clark Regional Emergency Services Agency, Clark Regional Wastewater District, Cowlitz Public Utility District, C-Tran, Educational Service District #112, Evergreen School District, La Center School District, Lewis County, NW</li> </ul>

## Mutual Aid Channel and Description

	Regional Transportation Council, Oregon State Department of Transportation, Port of Camas/Washougal, Port of Longview, Port of Vancouver, Ridgefield School District, Town of Yacolt, Vancouver Fire Department, Vancouver School District, Washington School For The Deaf, Washington State Department of Transportation, Washington State Patrol
<b>Available Resources</b>	Resources include labor, equipment and materials when available on a reimbursable basis for services, roadway construction, maintenance activities, and facilities support.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>■ GEM is the only formal mechanism outside of EMAC that supports mutual aid within the PMR in both the State of Oregon and the State of Washington.</li> <li>■ The agreement supports routine construction and maintenance activities but can also be leveraged during emergencies.</li> <li>■ Requests for service must specify in writing the particular service required, the amounts and types of labor, equipment, and materials required, the location of the work, the estimated cost of the work and other pertinent information.</li> <li>■ The responding party must accept or reject the request, provide an estimated cost of the work, have it signed by an authorized official, and return one copy to the requesting party.</li> <li>■ In cases of emergency or unforeseen circumstance necessitating prompt action the request and approval may be done verbally but must be documented in writing within forty-eight (48) hours of the verbal request.</li> <li>■ The requesting party is required to reimburse the responding party for its actual direct and related indirect costs, including any administrative overhead charges.</li> <li>■ The maximum amount payable for work performed under this agreement is fifty thousand dollars (\$50,000) per calendar year by each signatory.</li> </ul>
<b>More Information</b>	<ul style="list-style-type: none"> <li>■ Agreement homepage: <a href="http://www.gematwork.org/">http://www.gematwork.org/</a></li> <li>■ Link to agreement: <a href="http://www.gematwork.org/documents/GEM%20INTERLOCAL%202015.pdf">http://www.gematwork.org/documents/GEM%20INTERLOCAL%202015.pdf</a></li> </ul>

### Washington Intrastate Mutual Aid System (WAMAS) (Revised Code of Washington 38.56)

<b>Purpose</b>	Outlines the intrastate mutual aid system established to provide for mutual assistance in an emergency among political subdivisions and federally recognized Indian tribes that choose to participate.
<b>Coordinating Agency</b>	Washington State Emergency Management Division
<b>Eligible Organizations in the PMR</b>	All Washington State counties and cities; tribes may opt in; does not include special purpose agencies
<b>Available Resources</b>	Assistance in the form of personnel or resources may be requested for response, mitigation, recovery, or preparedness activities including drills and exercises.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>■ The chief executive officer of one jurisdiction requests assistance from the chief executive officer of another jurisdiction. Verbal requests are allowed but must be confirmed in writing within 30 days.</li> <li>■ Operational control of assistance belongs to the requesting jurisdiction.</li> <li>■ Includes provisions for reimbursement for assistance as well as donation of assistance.</li> <li>■ Includes provisions for responding personnel qualifications.</li> </ul>

## Mutual Aid Channel and Description

<b>More Information</b>	<ul style="list-style-type: none"> <li>By default, all jurisdictions are included unless a jurisdiction chooses to opt out of this system; tribes can opt in.</li> </ul>
	<ul style="list-style-type: none"> <li>General information: <a href="https://mil.wa.gov/uploads/pdf/logistics-resources/wamas-statewide-training.pdf">https://mil.wa.gov/uploads/pdf/logistics-resources/wamas-statewide-training.pdf</a></li> </ul>
	<ul style="list-style-type: none"> <li>Link to agreement: <a href="http://app.leg.wa.gov/rcw/default.aspx?cite=38.56&amp;full=true">http://app.leg.wa.gov/rcw/default.aspx?cite=38.56&amp;full=true</a></li> </ul>

### Washington State Fire Services Resource Mobilization Plan (1994; rev. 2017)

<b>Purpose</b>	Implemented to provide personnel, equipment, and other logistical resources from around the state when a wild land fire or other emergency exceeds the firefighting capacity of local jurisdictions fires, disasters, or other events that meet the intent of the Mobilization Plan Legislation (RCW 43.43.961).
<b>Coordinating Agency</b>	Washington State Patrol - Office of the State Fire Marshal
<b>Eligible Organizations in the PMR</b>	Fire agencies in Washington state
<b>Available Resources</b>	<ul style="list-style-type: none"> <li>Resources covered by this plan include all-hazard resources, to mean those regularly provided by fire departments, fire districts, and regional fire protection authorities required to respond to natural or man-made incidents, including but not limited to wild land fires, landslides, earthquakes, floods, and contagious diseases.</li> <li>This also includes non-fire service resources, such as an integrated incident management team.</li> </ul>
<b>Provisions</b>	<ul style="list-style-type: none"> <li>The responsible fire chief requests assistance from Regional Fire Resource Coordinator. The Washington State Patrol Office chief approves request.</li> <li>The plan includes policies and procedures for activation, requesting and sending resources, resource management, resource configuration, and reimbursement. It also includes equipment and compensation rates.</li> </ul>

### Washington Water/Wastewater Agency Response Network (WAWARN)

<b>Purpose</b>	Composed of member utilities providing voluntary assistance to each other during an emergency incident.
<b>Coordinating Agency</b>	WAWARN Organization
<b>Eligible Organizations in the PMR</b>	Washington State Water and Wastewater Agencies, including private utilities
<b>Available Resources</b>	Resources include personnel, equipment, and materials that are required to restore critical operations to water and wastewater utilities that have sustained damages from natural or man-made emergency events.
<b>Provisions</b>	<ul style="list-style-type: none"> <li>No emergency declaration is required.</li> <li>Requests are made by an authorized official of one member organization to another member organization, either in writing or verbally (supported by written confirmation as soon as possible).</li> <li>Responding personnel remain under the control of the responding organization.</li> </ul>

### Mutual Aid Channel and Description

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- Food and shelter for responding personnel should be provided by the requesting organization when possible; if not possible, the costs which the responding organization incurs for food and shelter must not exceed the State per diem rate for that area (unless the responding organization can demonstrate that excess costs are necessary).
- The requesting organization will provide responding personnel with radio equipment (or radio frequency information if provided by the responding organization).
- Responding organizations must keep accurate records of work performed, including personnel hours, equipment, and supplies.
- The responding organization must supply the requesting organization with an itemized bill within ninety (90) days of the conclusion of the response.
  - Reimbursement is due forty-five (45) days after the billing date.
  - Personnel, equipment, materials, and supplies are all reimbursable.

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#### ***More Information***

Link to agreement: <https://wawarn.org/documents/warn-mutual-aid-agreement.pdf>

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# Appendix 1: Resource Request Form

The *Resource Request Form*, included as an attachment, is a standardized form available in Microsoft Word, Microsoft Excel, and Adobe PDF versions.

Resource requesters from any organization should use the *Resource Request Form* to document their resource requests and the information needed to process the request. The form aligns with the guidance included in the *Resource Requester Guide* in this *Handbook*.

Resource requesters, as well as EOC staff, may use the step-by-step instructions for completing each section of the *Resource Request Form* included in this *Appendix*. The instructions are applicable to all versions of the *Form*.

## User Notes

- The request information may also be documented using the *Resource Request Tracking Sheet* or an information system.
- Paper copies of the forms should be used if information systems are disrupted.
- Section III, Section IV, and Section V can be separated and/or removed from the *Resource Request Form*. If any section is removed or separated, resource request managers can use the *Resource Request Tracking Sheet* (or another information system) in parallel to maintain visibility on information in any section.

## Instructions

### *Section I: Request Information*

#### Purpose

*Section I* of the *Resource Request Form* captures metadata about the request used by the EOC for processing, tracking, and filling resource requests. **The resource requester and the Operations Section, Logistics Section, and Finance Section in the EOC or receiving organization should complete different fields in *Section I* as described below.**

#### Preparation

- See *Emergency Resource Request Management Handbook (Handbook)*, *Appendix 6: Key Questions for Resource Requests* for additional guidance regarding information to be included on the *Resource Request Form*.
- See *Handbook*, *Table 4: Resource Kinds* for definitions of resource kinds.
- See *Handbook*, *Table 11: Resource Priority Levels* for definitions of regional priority levels.
- See *Handbook*, *Table 13: Resource Request Status* for status definitions.

#### Notes

- If a resource requester is requesting multiple items, it will be easier for the EOC to process if requests are separated out by resource kinds (e.g., supplies, equipment, personnel). Where possible, do not mix different resource kinds on a form.

- Methods for associated tracking numbers will vary by organization; some may assign distinct numbers to each associated element, while others may assign a “tag” to the same root number (e.g., 123456789-A and 12345689-B).
- As *Section III: Request Management* is completed, Operations, Logistics, and Finance sections should coordinate to update the Status Log in *Section I: Request Information* and on the *Resource Request Tracking Sheet*. Communicate the status update and the tracking number to the requester.
- If the request is sent to the state, the Logistics Section should amend the Priority field to indicate “Other” and insert the corresponding priority level per the state’s priority system in the appropriate field in the status log.

**Table 19: Instructions for Section I: Request Information**

Field Title	Responsible Party	Instructions
<b>Tracking #</b>	Logistics Section	Assign a tracking number per the EOC’s tracking system.
<b>Associated # or Tag</b>	Logistics Section	Optional tracking number for associated items (e.g., equipment and operator).
<b>Beneficiary</b>	Resource Requester	Identify the organization that will be the recipient of the resource.
<b>Form Completed By</b>	Resource Requester	Fill out contact information for person completing the form.
<b>Priority</b>	Logistics Section	Identify the priority of the resource as outlined in <i>Handbook Table 11: Resource Priority Levels</i> .
<b>Resource Kind</b>	Resource Requester	Self-explanatory. See <i>Handbook Table 4: Resource Kinds</i> for definitions.
<b>Incident Name</b>	Resource Requester	Identify the name of the incident.
<b>Incident #</b>	Resource Requester	Enter local and/or state incident number.
<b>Status Log</b>	Resource Requester Operations Section Logistics Section Finance Section	<ul style="list-style-type: none"> <li>• Initial entry: resource requester checks the box for “New Request” and enters the corresponding time and date.</li> <li>• Subsequent entries: The Logistics Section, and the Operations Section or Finance Section when appropriate, maintains the status of the request and enters any changes along with the corresponding time and date.</li> <li>• See <i>Handbook Table 13: Resource Request Status</i> for definitions.</li> </ul>

## Section II: Resource Request

### Purpose

*Section II* of the *Resource Request Form* captures details about the requested resource and its intended mission, specifies a delivery method and location, and ensures that the request is authorized. **The resource requester should complete Section II.**



## Preparation

- Identify all information regarding the resource need to include in the *Resource Request Form*, including:
  - Payment information;
  - Support needs;
  - Delivery;
  - Transportation issues; and
  - Safety Issues.
- See *Handbook, Appendix 6: Key Questions for Resource Requests* for additional guidance regarding information to be included in Fields 4 and 5 of *Section II: Resource Request*.

## Distribution

- Determine the appropriate organization or EOC to contact regarding the resource request using the *Resource Contact Algorithm* found in the *Handbook*.
- The *Resource Request Form* can typically be submitted to the EOC by any method (e.g., email, fax, information system).
- Resource requesters should call the EOC or other appropriate organization (as determined above) after submittal to confirm receipt.

## Notes

- Signature requirements vary by jurisdiction. Some jurisdictions require a handwritten signature while others will accept digital sign-off. In cases where a handwritten signature is needed, jurisdictions should consider allowing digital authorization initially with handwritten signature provided at a later date.
- If the same resource is needed at multiple locations at the same site, the resource requester should indicate this in the request in Field 4. If the same resource is needed at multiple sites, requiring the resource to be delivered to multiple locations, the requester should fill out a *Resource Request Form* for each delivery location.

**Table 20: Instructions for Section II: Resource Request**

Field	Field Title	Instructions
1	<b>Requesting Organization/Department</b>	The name of the organization or department requesting the resource.
2	<b>Time/Date Submitted</b>	The date and time of the initial entry.
3	<b>Position Contact</b>	Fill out requester position contact information.

Field	Field Title	Instructions
4	Specify Resource Requested	<ul style="list-style-type: none"> <li>If known, identify the resource needed in detail (e.g., name, description, type, size, performance specifications).</li> <li>Identify the quantity of the resource needed.</li> <li>Use additional rows to identify supporting resources (e.g., fuel, trained staff for operation) as necessary.</li> <li>Unless required, <u>do not</u> request a specific make, model, manufacturer, or provider of a resource.</li> <li>Check the appropriate box to indicate whether comparable alternatives to the requested resource are acceptable.</li> <li>If exact specifications are not known, leave this field blank and proceed to Field 5.</li> </ul>
5	Describe the Mission for this Resource	Describe the mission that the resource requested is needed for (e.g., provide emergency power to facility). Required if Field 4 indicates that comparable alternatives are acceptable or if Field 4 is unknown.
6	Time/Date Needed	The time and date the resource is needed.
7	Duration Needed	Enter the amount of time the resource is needed.
8	Expected Recurring Need	Indicate if the resource is needed on a recurring basis. If yes, then explain (e.g., supplied twice daily for 10 days).
9	Delivery Location or Address	Enter the location or address (if possible) to which the resource will be delivered. Include latitude and longitude (if necessary and available).
10	Route or Delivery Instructions	Identify any delivery considerations (e.g., access restrictions, ability to unload).
11	Receiving POC Contact	Fill out contact information for receiving POC. Specify an address if it is different from the one entered in Field 9.
12	Authorization	<ul style="list-style-type: none"> <li>The requester <i>must</i> secure authorization for the request.</li> <li>Any request submitted without approval is subject to being returned immediately.</li> </ul>

### Section III: Request Management

#### Purpose

Section III of the *Resource Request Form* captures details describing the procurement of the requested resource. **The EOC Operations, Logistics, and Finance sections should coordinate to complete Section III.**

#### Preparation

- Validate the resource request is eligible for fulfillment through the EOC. Confirm that the:
  - Request is related to incident;
  - Requester is unable to get the resource; and

- EOC should obtain the resource.
- Verify the request has the proper authorization documentation.
- Contact the requester to:
  - Verify that the request is received;
  - Identify any information that needs to be clarified; and
  - Ensure that all required fields are completed.
- Determine the priority of the resource as outlined in the *Handbook, Table 11: Resource Priority Levels* and enter the priority in *Section I: Request Information*.
- Maintain the status of the request and enter any changes into the Status Log along with the corresponding time and date. See *Handbook, Table 13: Resource Request Status* for status definitions.
- Examine the request for opportunities to group requested resources if multiple similar resources are requested.
- If the request is submitted to the state EOC:
  - Identify the state tracking number;
  - Communicate status of this request to the requester; and
  - Communicate with the state at least once an operational period to determine the status of request.

## Notes

- If the specified request is not immediately available and an alternative resource is identified based on the mission description, the Logistics Section **must** ask the requester to approve the alternate resource.
- Logistics and Finance section personnel can use the *Handbook, Appendix 3: Incident Finance and Administration Worksheet* as a tool to outline spending limits, purchasing authorities, and other resource ordering decision points during an incident as described in the *Setting an Ordering Process* section of the *Handbook*.
- As *Section III: Request Management* is completed, Logistics and Finance sections should update the Status Log in *Section I: Request Information* and on the *Resource Request Tracking Sheet*. Communicate the status update and the tracking number to the requester.

**Table 21: Instructions for Section III: Request Management**

Field	Field Title	Instructions
13	Assigned To	Identify which agency or ESF has the lead for identifying a source (if applicable).
14	Action Taken	Identify any research and/or calls made to identify a source.
15	Transaction Type/Contract Type/Source Options	<ul style="list-style-type: none"> <li>• In the left column, specify what source (or sources) will fill the request.</li> <li>• In the middle column, identify the source's status with respect to filling the request (e.g., assembling resource) as well as the time and date at which this status was provided.</li> <li>• In the right column, for each source used, describe what part of the mission is being sourced, estimated/quoted</li> </ul>

Field	Field Title	Instructions
		cost, references, or contract numbers (e.g., contract name, contract number, p-card purchase total amount, vendor-quoted amount, state tracking number).
16	<b>Payment or Reimbursement Comments</b>	Describe any provisions or rules specific to the transaction(s) to procure the resource (e.g., special conditions or limitations stipulated in the contract or purchase order).
17	<b>Financial and Payment Information</b>	<ul style="list-style-type: none"> <li>Enter the Project Payment Code established by the Finance Section for the incident (e.g., WBS code, Tcode, Project Outline Number).</li> <li>Enter any purchase, contract reference, financial tracking, and/or purchase confirmation numbers.</li> </ul>
18	<b>Total Cost Estimate</b>	Provide an estimate of the total cost.
19	<b>Cost Breakdown</b>	Describe the breakdown of cost by item and/or by source if applicable (e.g., include mobilization, labor, per diem, shipping). If there is only a single item and source, write “N/A” in the first row.

## Section IV: Resource Use

### Purpose

Section IV of the *Resource Request Form* captures information about how the resource was used throughout its deployment. **The Planning Section in coordination with the Logistics Section should complete Section IV.**

### Preparation

- The Logistics Section should use the *Resource Request Tracking Sheet* and the *Resource Request Form* to track the deployment of resources and share the information with the Planning Section staff. The Planning Section documents the use of the resource once the resource has been received.
- Reference the *Resource Request Form* to determine where the resource is ultimately needed and the timeframe for delivery.

### Notes

- This section of the *Resource Request Form* and the *Resource Request Tracking Sheet* should be updated with multiple entries to describe how the resource is used throughout its deployment. The number and frequency of the updates depends on multiple factors (e.g., if the resource is used for different purposes, or at various locations).
- It may be necessary to fill requests from multiple sources as indicated in Field 15 in *Section III: Request Management*. If this the case, the Planning Section may create additional copies of *Sections IV – V* of the *Resource Request Form* as necessary for each individual resource source.

**Table 22: Instructions for Section IV: Resource Use**

Field	Field Title	Instructions
20	Resource Provider	List the resource provider name and contact information.
21	Use Log	<ul style="list-style-type: none"><li>Describe where, when, and how the resource was used as well as what needs the resource met/why it was used.</li><li>Any equipment should also include the associated operator.</li></ul>

## Section V: Asset Disposition

### Purpose

Section V of the *Resource Request Form* captures information about how the resource was demobilized. **The Planning Section and the Logistics Section should complete Section V.**

### Preparation

The Planning Section (Demobilization Unit Leader, if established) generally coordinates demobilization planning.

### Notes

It may be necessary to fill requests from multiple sources as indicated in Field 15 in *Section III: Request Management*. If this the case, the Planning Section may create additional copies of *Sections IV – V* of the *Resource Request Form* as necessary for each individual resource source.

**Table 23: Instructions for Section V: Asset Disposition**

Field	Field Title	Instructions
22	Asset Disposition	Check the appropriate box to indicate if the item has been returned, consumed, kept to be used again, auctioned, or donated. If none of these dispositions are applicable, mark “Other” and specify the item’s disposition.
23	Description of Use	<p>Describe where, when, and how the resource was used as well as what needs the resource met and/or why it was used (see Field 21 in <i>Section IV: Resource Use</i>).</p> <ul style="list-style-type: none"><li>This information is used to verify the use of the resource while deployed to inform post-event cost recovery efforts.</li></ul>
24	Demobilization Requirements	<ul style="list-style-type: none"><li>Enter the time and date that the resource was returned.</li><li>Identify the address or location to which the resource was returned.</li><li>Include any specific requirements regarding the return of the resource.</li></ul>
25	Received By	Describe where, when, and who received the resource.
26	Condition of Asset	<ul style="list-style-type: none"><li>Describe the condition of the resource upon its return. If damaged, describe the type of damage in detail.</li><li>Provide pictures of the resource upon its return, if possible.</li></ul>

Field	Field Title	Instructions
		<ul style="list-style-type: none"> <li>If the asset was not returned, write “N/A”.</li> </ul>

## Appendix 2: Resource Request Tracking Sheet

The *Resource Request Tracking Sheet*, included as an attachment, is a Microsoft Excel file designed to provide an alternative option for an EOC Logistic Section and other resource managers to track resource requests as well as resource deployments. The fields in the *Resource Request Tracking Sheet* align to the fields in the *Resource Request Form*.

### User Notes

- Users can hide columns that they do not want to use or change field names as appropriate in the Microsoft Excel file, but are encouraged **not** to delete columns to avoid breaking connections between cells established within the file.
- Users can export information from information systems where they are collecting resource requests to populate the *Resource Request Tracking Sheet*. Users who do this should exercise caution to ensure the exported fields align with the *Tracking Sheet* when the information is integrated in.

## Appendix 3: Incident Finance and Administration Worksheet

The *Incident Finance and Administration Worksheet*, included as an attachment, is a Microsoft Word file designed to help organizations and their EOC staff identify the specific authorities and requirements that will apply to ordering, procurement, and financial management during an incident. The *Worksheet* also provides guidance for determining the guidelines for activating mutual aid agreements. Organizations and EOC staff should review this *Worksheet* at the beginning of every incident to ensure they have documented all appropriate information for managing their procurement processes throughout the incident.

Step-by-step instructions for completing each section of *Incident Finance and Administration Worksheet* are included in this *Appendix*.

### Instructions

#### *Purpose*

This *Worksheet* identifies incident-specific purchasing authorities and decision points that will apply to ordering, procurement, and financial management during an incident. This serves as internal guidance for an organization on the resource ordering process throughout the incident. The *Worksheet* also provides guidance for determining the guidelines for activating mutual aid agreements.

#### *Preparation*

Both the requesting organizations and the Logistics and Finance Sections in an EOC fill out this worksheet to ensure they have documented all appropriate information for managing procurement processes throughout the incident within their organization.

#### *Notes*

Organizations can use this *Worksheet* to communicate the person(s) or position(s) authorized by the organization to request resources to the EOC. This provides a reliable way to ensure that resource requests are authorized.

**Table 24: Instructions for Incident Finance and Administration Worksheet**

Field	Field Title	Instructions
1	<b>Incident Name</b>	Identify the name of the incident.
2	<b>Incident #</b>	Enter local and/or state incident number.
3	<b>Emergency Declared?</b>	Indicate if the incident has been declared an emergency. If yes, then enter the date and time at which the emergency was declared and the authority declaring the emergency.



Field	Field Title	Instructions
4	<b>General Description of Authorities Altered per Declaration</b>	<ul style="list-style-type: none"> <li>Identify incident-specific authorities, in any (e.g., expanded purchasing power, adjusted spending limits, no-bid conditions).</li> <li>See <i>Local Governments and Authorities in Emergency Resource Request Management Handbook, Appendix 10: References</i>.</li> </ul>
5	<b>Form Completed By</b>	Fill out contact information for person completing the form.
6	<b>Expenditure Limit (Per Day) for Incident</b>	Identify the expenditure limit for the incident per day.
7	<b>Expenditure Limit (Total) for Incident</b>	Identify the expenditure limit for the entire incident.
8	<b>P-Card Limits</b>	Identify the set P-Card limit.
9	<b>Allowable P-Card Limit Increase</b>	Identify the increases allowed to the P-Card limits.
10	<b>EOC Director</b>	Enter the amount of money that the EOC Director is authorized to spend on a single item, if applicable.
11	<b>Section Chief</b>	Enter the amount of money that an EOC Section Chief is authorized to spend on a single item, if applicable.
12	<b>Logistics Section Staff</b>	Enter the amount of money that EOC Logistics Section Staff is authorized to spend on a single item, if applicable.
13	<b>Finance Section Staff</b>	Enter the amount of money that EOC Finance Section Staff is authorized to spend on a single item, if applicable.
14	<b>Authority for Greater Expenditures Must be Authorized By</b>	<ul style="list-style-type: none"> <li>Check the appropriate box (or boxes) to indicate whether spending authorities in the EOC exceeding those indicated in Fields 10-13 must be authorized by the EOC Director and/or the Finance Section Chief.</li> <li>If authorization is acquired from another EOC position, check the box for "Other" and identify the position.</li> </ul>
15-18	<b>Staff Position</b>	<ul style="list-style-type: none"> <li>Enter the amount of money that a particular staff position within an organization is authorized to spend on a single item, if applicable.</li> <li>Identify the position.</li> <li>Not all fields must be used.</li> </ul>
19	<b>Authority for Greater Expenditures Must be Authorized By</b>	<ul style="list-style-type: none"> <li>Check the appropriate box (or boxes) to indicate whether spending authorities in an organization exceeding those indicated in Fields 15-18 must be authorized by a particular staff position. Identify the position in the space next to the checked box.</li> <li>Not all fields must be used.</li> </ul>
20	<b>General Spending and Sourcing Guidelines</b>	<ul style="list-style-type: none"> <li>Check the box for any applicable alterations in incident-specific authorities.</li> </ul>

Field	Field Title	Instructions
		<ul style="list-style-type: none"> <li>• If the applicable incident-specific authority is not already listed, check the box for “Other” and describe the incident-specific authority in the space to the right.</li> <li>• More than one box may be checked.</li> </ul>
21	<b>Mutual Aid</b>	<ul style="list-style-type: none"> <li>• Check the appropriate box (or boxes) to indicate any mutual aid agreements activated.</li> <li>• More than one box may be checked.</li> </ul>
22	<b>Single Point Ordering</b>	Indicate whether the EOC is authorized to directly order resources and obligate agency funds on behalf of all agency departments, divisions, and offices by checking the appropriate box and listing any exceptions below (if applicable).
23	<b>Other Financial Directives</b>	Detail any other special delegations or transfers of authority which have not yet been addressed in the <i>Worksheet</i> .
24	<b>Agency Administrator</b>	Enter the printed name of the Agency Administrator. Administrator signs and dates to indicate approval of <i>Worksheet</i> contents.
25	<b>Agency Chief Financial Officer</b>	Enter the printed name of the agency chief financial officer (CFO). CFO signs and dates to indicate approval of <i>Worksheet</i> contents.

## Appendix 4: Delegation of Authority Templates

The following pages present memo templates which cities and counties may use to delegate authority for purchasing during emergencies. The first template provides a memo within an agency to delegate additional purchasing authorities. The second template delegates authority to a supporting organization to authorize purchases on the designating authority's behalf.

## Delegation of Authority within an Organization

To: [Authorized POC Name]

Subject: Delegation of Authority for emergency resource ordering for the [incident name].

You are hereby delegated with the authority to order resources on the part of [organization] in response to [incident name] from [start date] through [end date].

Your primary responsibility is to manage the resource ordering process and submit resource orders to support the overall incident response.

You will be responsible for communicating a resource assessment, incurred costs, and projected expenses to the Finance Section Chief.

DATED THIS \_\_\_\_ day of \_\_\_\_, 20\_\_\_\_.

By: \_\_\_\_\_  
[Authorization Personnel]  
[Organization]

RECEIVED BY:

By: \_\_\_\_\_  
[Authorized Individual]

## Delegation of Authority to Supporting Organization

To: [Supporting Agency POC Name/Email]

Subject: Delegation of Authority for emergency resource ordering for the [incident name].

[Authorized individual's name, organization] has authority to order resources on the part of [insert organization] in response to [incident name] through [insert date]. Requests will be submitted through [insert system/method].

[Insert applicable financial information and restrictions]

DATED THIS \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

By: \_\_\_\_\_  
[Authorization Personnel]  
[Organization]

RECEIVED BY:

By: \_\_\_\_\_  
[Authorized Individual]

## Appendix 5: Regional Coordination Call Agenda

The agenda below provides a standardized template to guide a Regional Coordination Call.

### Regional Coordination Call

Incident Name

Month Date, Year

XX:XX – XX:XX

Topic	Presenter
Situation and Support Requirements <ul style="list-style-type: none"><li>• Actions occurring in impacted counties</li><li>• Areas for additional support</li><li>• Availability of counties to provide support</li></ul>	Each participating county <ul style="list-style-type: none"><li>• Impacted counties</li><li>• Supporting counties</li></ul>
Resource Need Determination <ul style="list-style-type: none"><li>• Identify resource requests that cannot be filled within impacted counties<ul style="list-style-type: none"><li>▪ Alternate resources</li><li>▪ Potential scarce resources</li></ul></li></ul>	Impacted counties
Regional Resources <ul style="list-style-type: none"><li>• Available resources to meet identified needs</li></ul>	Supporting counties
Resource Request Process <ul style="list-style-type: none"><li>• RLST or MAC Group considerations</li><li>• Other process considerations</li></ul>	RLST or MAC Group designee
Next Steps	RLST or MAC Group designee

## Appendix 6: Key Questions for Resource Requests

The following list of questions is intended to help the requester accurately identify resource details and the mission which the resource will help accomplish. Although this list is not exhaustive, the requester can provide a more robust resource or mission description by considering some or all of these questions and add clarity on specific resource requests. The questions are loosely grouped by NIMS resource kinds.

### *General Questions*

- What task needs to be accomplished?
- What is the situation that needs to be addressed with the resource?
- Are there any space or physical infrastructure limitations?
- Are there any time limitations or considerations?
- What are the power capabilities or restrictions?
- For personnel resources, is there any certifications, licensing, training, or specific skill requirements?
- What amount of the resource is needed (e.g., quantity, size)?
- If the preferred resource is unavailable, are there comparable resources which might suffice?

### *Personnel or Services*

- What is the assignment?
- What qualifications are required?
- What skills and abilities are required?
- Are specific licenses, certifications, credentials, or languages required?
- What are the physical fitness requirements?
- How much experience is required?
- What is the minimum age?
- What is the expected shift length?
- What is the expected length of the assignment?
- Are service agreements required? What is the frequency of service needed?
- Is insurance/bonding required?
- Is overhead needed (e.g., supervision, logistics, administration, etc.)?
- If overhead is required, will the requester provide it?
- Will a supervisor/crew leader be required?
- Will personnel require supplies and equipment (e.g., personal protective equipment, etc.)?
- Will personnel require communications equipment?
- If any supplies or equipment are required, will the requester provide them?
- Will personnel require food and/or lodging? Who will provide it?
- Can volunteers fill this assignment? Do volunteers require experience or previous affiliation?
- Can offender work crews fill this assignment?

### *Equipment*

- What capacity is needed?
- What size is needed?
- What type is needed?
- Should it include an operator?

- Does the equipment require fuel or maintenance service?
- Does the equipment require installation, and if so, who will arrange for it?
- Is there a preferred brand, make, and model?
- Are specific connectors required (e.g., power supply, hose, fittings, valve, etc.)?

### *Supplies*

- What unit size is needed (e.g., how many units in a box, and how many boxes in a case)?
- What type of container is preferred?
- Will other equipment (e.g., forklifts, jacks, etc.) be required to support offloading and handling?
- Are specific connectors required (e.g., power supply, hose, fittings, valve, etc.)?

### *Food*

- Will meals be served buffet-style, such as with hot trays and plates?
- Will meals be portable, such as box or sack lunches?
- Is refrigeration available?
- Are shelf-stable meals, such as MREs, required?
- Will condiments be served in the meal or on the side?
- Does the meal require basic tableware (e.g., cutlery, plates, napkins, etc.)?
- Is there a minimum calorie requirement?
- Is the food for administrative/office personnel or field/operational personnel?
- Are there any special dietary considerations (e.g., allergies, vegan/vegetarian, lactose- or gluten-free, etc.)?
- Is a kitchen available? What preparation area is available?
- When can the vendor access the kitchen/preparation area? Are there any restrictions on the use of the kitchen/preparation area?
- Is a mobile kitchen or Red Cross canteen service required?
- Is there a suitable eating area (e.g., tables and chairs)?
- Does the eating area provide for sanitation (e.g., handwashing facilities and garbage service)?

### *Aviation*

- What is the mission for the aircraft?
  - Medical evacuation
  - Search and rescue for lost or stranded persons or craft
  - Search for criminal suspect (law enforcement)
  - Damage/situation assessment
  - Aerial photography
  - Personnel transport
  - Equipment/supplies transport
  - Other?
- Will the mission require hoist operations?
- Will the mission require search lights?
- Will the mission require Forward Looking Infrared Radiometer (FLIR) capabilities?
- Can fixed wing aircraft be used?
- Do you have access to air-to-ground radio frequencies?



## Appendix 7: Non-Competitive Procurement Guidelines

FEMA may determine that sole source contracting is an acceptable practice under limited circumstances. These limited circumstances can be found at 2 C.F.R. § 200.320(f). Acceptable circumstances are:

- The item is available only from a single source;
- The public exigency or emergency for the requirement will not permit a delay resulting from competitive solicitation;
- The Federal awarding agency or pass-through entity expressly authorizes noncompetitive proposals in response to a written request from the non-Federal entity; or
- After solicitation of a number of sources, competition is determined inadequate.

Although FEMA provides scenarios in which the acceptable practice is for applicants to execute non-competitive proposals, FEMA encourages a competitive bid process. Applicants choosing to use a non-competitive procurement method outside of a declared emergency period or clear public exigency situation should consult with their state and FEMA representatives and be able to provide sound justification for their request to deviate from the preferred competitive proposal process.

Failure to utilize or transition to more appropriate methods of contracting at the conclusion of the exigent or emergency circumstance can result in an adverse finding by the Department of Homeland Security (DHS), Office of Inspector General (OIG). A negative finding could result in recommendations to de-obligate or disallow all or a portion of incurred costs.

If the jurisdiction chooses to use a non-competitive procurement method, a justification memo should be created that discusses why this approach was necessary and this justification memo should accompany the submission of documentation to FEMA and be included in the attachments for the Project Worksheet (PW).

At minimum, the justification memo should include, but not be limited to, a reference to the agency's adopted and practiced policies and procedures for engaging in a non-competitive procurement including the following:

- Reference to the agency's simplified procurement threshold language;
- Reference to circumstances that require this form of contracting as described at 2 C.F.R. § 200.320(f);
- A rationale for the method of procurement 2 C.F.R. § 200.318(i);
- Discussion of selection of contract type;
- Discussion of contractor selection; and
- Basis for contract price.

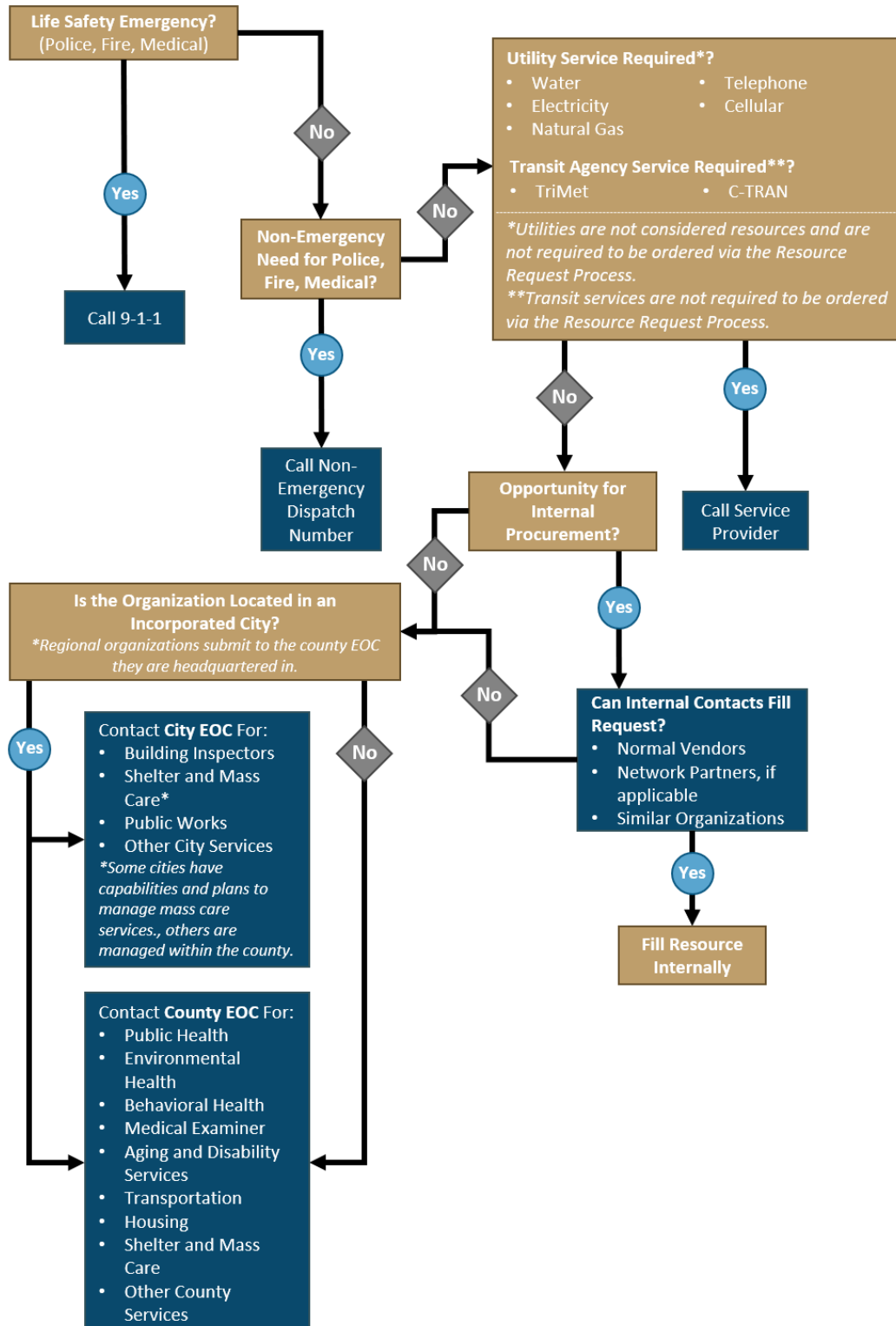
In addition to providing this justification memo, Applicants are required to submit proposed procurement documents to FEMA and/or their state emergency management agency for review prior to awarding the sole source or non-competitive contract.

Applicants considering a non-competitive procurement method should also be aware that environmental planning and historic preservation compliance is required for all federally funded

projects. As such, Applicants should expect that any permanent work projects planned within an environmentally sensitive area or a historically noted location will experience additional FEMA or State Historic Preservation Office (SHPO) review and will be subject to all environmental and historic preservation (EHP) regulations, laws, and executive orders, as applicable. Compliance may ultimately affect or change the project timeline and proposed scope of work.

## Appendix 8: Resource Contact Algorithm

The *Resource Contact Algorithm* provides guidance to resource requesters on whom to contact for their resource needs depending on their organization and the need.



## Appendix 9: Glossary

Term	Definition
<b>Purchasing Co-operative Agreements (Co-Ops)</b>	Co-ops are contracting channels available to signatory jurisdictions, not necessarily requiring geographic proximity to the primary contracting entity. These can be used to facilitate purchasing of scarce resources.
<b>Cost Tracking</b>	System for recording and maintaining the financial burden incurred by all resources used during disaster response and recovery, including costs for time, damage or depreciation, transport, operation, fuel, and purchase.
<b>Delegation of Authority</b>	Action by which an elected or executive official or Agency Administrator delegates his or her authority to a subordinate. In the context of the <i>Handbook</i> , this refers to the delegation of authority for expending funds in an emergency.
<b>Demobilization</b>	The orderly, safe, and efficient return of an incident resource to its original location and status.
<b>Department Operations Center (DOC)</b>	Discipline/agency-specific, off-incident facility that provides direction, coordination, and/or support for an incident.
<b>Deployment</b>	The transition that occurs when an ordered resource is delivered to the specified location for use in response to an incident.
<b>Emergency Coordination Center (ECC)</b>	See Emergency Operations Center (EOC).
<b>Emergency Declaration</b>	<p>Action by which city or county elected officials or delegates recognize emergency conditions and may implement temporary policies in response to an incident or emergency affecting their jurisdiction. Such policies may allow standard purchasing and procurement rules to be suspended or altered.</p> <p>The state and federal government may also declare emergencies based on the impact and the need of the jurisdiction or area where the disaster occurred.</p>
<b>Emergency Operations Center (EOC)</b>	<p>A physical location at which the coordination of information and resources to support incident management (on-scene operations) activities normally takes place. These actions include resource, information, and interagency coordination. It may also have access to its own agency resources and can typically allocate/reallocate those resources without deference to another entity.</p> <p>EOCs typically exist at the city, county, and state levels during large incidents. County EOCs are the local access points for most state and federal resources.</p> <p>EOCs may also be referred to as emergency coordination centers (ECC).</p>

Term	Definition
<b>Emergency Resource Management</b>	Process used to request, order, track, and maintain resources when an incident is of such complexity that routine systems are overwhelmed. Transition from routine to emergency resource management processes is usually accompanied by activation of the EOC.
<b>Federal Emergency Management Agency (FEMA)</b>	Highest level to which resource requests can be sent. If a state is unable to fill a resource request, it will submit the request to FEMA, which will fill the request using federal resources or vendors.
<b>Finance Section</b>	The ICS Section responsible for an incident's administrative and financial considerations. This section procures and pays for resources.
<b>Incident</b>	Any emergency situation. For the purposes of the <i>Handbook</i> , incidents refer to a condition of disaster, emergency, or of extreme peril to the safety of persons and property caused by such conditions as air pollution, fire, flood, hazardous material incident, storm, epidemic, riot, drought, sudden and severe energy shortage, plant or animal infestations or disease, earthquake or other conditions.
<b>Incident Command System (ICS)</b>	A standardized approach to the command, control, and coordination of on-scene incident management, providing a common hierarchy within which personnel from multiple organizations can be effective. In the PMR, ICS is also used in EOCs.
<b>Incident Commander</b>	The individual responsible for all incident activities, including the development of strategies and tactics and the ordering and release of resources.
<b>Local Resource Request Managers</b>	Staff within an EOC who are responsible for processing resource requests.
<b>Logistics Section</b>	The ICS Section responsible for providing facilities, services, and material support for the incident. This section receives resource requests, identifies source for resources, and orders resources.
<b>Mutual Aid Agreements</b>	Agreements between or among jurisdictions (often neighboring) which provide resource requesters the means to quickly obtain additional resources during an emergency when the requesting jurisdiction has or will soon exhaust its own sources. These agreements can exist between two or more cities, counties, states, or countries. Typically, jurisdictions seek to fill requests through these agreements before sending requests to a higher level of government.
<b>National Incident Management System (NIMS)</b>	Federal guidelines which define standardized channels and establish the resource management process to identify requirements, order and acquire, mobilize, track and report, recover and demobilize, reimburse, and inventory resources.
<b>Non-Competitive Procurement</b>	Purchase of a resource by a public agency or government without soliciting bids from multiple vendors (sometimes referenced as sole source contracting).
<b>Operations Section</b>	The ICS Section responsible for implementing tactical incident operations described in the Incident Action Plan. The Operations Section may include

Term	Definition
	subordinate branches, divisions, and/or groups. This section identifies, assigns, and supervises resources to respond to the disaster.
<b>Planning Section</b>	The ICS Section that collects, evaluates, and disseminates operational information related to the incident and for the preparation and documentation of the Incident Action Plan. This section tracks resources deployed in the field and identifies resource shortages (see Resources Unit).
<b>Portland Metropolitan Region (PMR)</b>	Geographic area located in the northwest part of the State of Oregon and the southwest part of the State of Washington, including, the City of Portland; Clackamas, Columbia, Multnomah, and Washington counties in Oregon; and Clark County in Washington.
<b>Private Sector Organizations</b>	Non-governmental or non-profit groups which have their own inventory of resources, as well as their own supply source of resources.
<b>Project Payment Code</b>	A billing code for the incident established by the Finance Section. Some jurisdictions use different terminology for this item, such as a WBS (Work Breakdown Structure) code, T-code (Transaction code), or Project Outline Number.
<b>Regional Disaster Preparedness Organization</b>	A partnership of government agencies, non-governmental organizations, and private-sector stakeholders in the Portland Metropolitan Region collaborating to increase the region's resiliency to disasters. The metropolitan region spans Clackamas, Columbia, Multnomah, and Washington counties in Oregon and Clark County in Washington.
<b>Regional Logistical Support Team (RLST)</b>	A specialized team that supports one or more impacted EOCs/EOCs by coordinating requests for resources from other PMR agencies.
<b>Regional Multi-Agency Coordination (MAC) Group</b>	A regional group consisting of senior executive county representatives from the PMR that provides strategic guidance and direction to support incident management activities. The MAC Group provides coordinated decision making, establishes priorities among incidents, and allocates scarce resources.
<b>Regional Multi-Agency Coordination (MAC) Support Organization</b>	A regional group that, upon activation, supports Regional MAC Group functions by providing key information and coordination elements, including situation status, resource status, internal logistics, communications systems integration, technical expertise, information sharing, and public information.
<b>Regional Organizations</b>	Governmental, quasi-governmental, or private-sector organizations whose geographic footprint and representation may include multiple city or county jurisdictions. These organizations have directed missions to support the response and their own inventory of resources to support their mission.
<b>Regional Resource Request Stakeholders</b>	Resource management stakeholders in the PMR who will coordinate to determine resource needs and availability for the requesting county or counties.

Term	Definition
<b>Resource</b>	Any personnel, facility, equipment, supplies, vehicle, team of personnel, or aircraft which can be utilized in the response to or recovery from an incident.
<b>Resource Request Form</b>	Common form included with the <i>Handbook</i> , initiated by the resource requester but also utilized by resource request managers. This form is used to request and track a specific resource.
<b>Resource Request Management Process</b>	Process by which needed resources are identified, requested, procured, deployed, tracked, and demobilized.
<b>Resource Requester</b>	Person who identifies resource needs within an organization and requests resources from their EOC. This can be a city or county organization (e.g., police), a private-sector response partner (e.g., healthcare facility), or a volunteer organization (e.g., American Red Cross) with a response mission or responsibility during the disaster.
<b>Resource Requesters</b>	Governmental or non-governmental organizations who need resources in order to complete their response missions or responsibilities during an emergency.
<b>Resources Unit</b>	Element of an ICS organization, if established within the EOC, which tracks resources deployed in the field and identifies resource shortages. Not all EOCs have established a Resources Unit. If it is not established, the responsibilities are held by the Planning Section or Logistics Section.
<b>Sole Source Contracting</b>	See <i>Non-Competitive Procurement</i> .
<b>Special Purpose Agencies</b>	Special purpose agencies are governmental organizations, other than cities and counties, that have directed missions to support incident response and their own inventory of resources and dispatch systems to support their mission. In the context of the <i>Handbook</i> , special purpose agencies include local service districts, special purpose districts, school districts, and agencies created through intergovernmental or interlocal agreements.
<b>Tracking Number</b>	Number assigned to a resource request by the EOC Logistics Section, per the established tracking system of that jurisdiction.
<b>Volunteer Organizations</b>	Organizations which provide volunteers in response to crises. Typically, these organizations have their own source of resources, sometimes through regional and national networks, to meet their disaster responsibilities.

## Appendix 10: References

One of the first tasks in writing this *Handbook* was to conduct a review of relevant federal, state, and local documents which guide the resource ordering processes across participating jurisdictions. Some parts of the *Handbook* refer directly to these documents; in other parts, these documents inform the contents of the *Handbook*. The *Handbook* is not intended to supersede these plans; rather, these plans should be used in the context of the processes outlined herein.

The following references are organized first by level of government and then according to jurisdiction, so that users can easily find those documents which are most relevant to the specific circumstances of their home jurisdiction. Included with these references are web links, wherever they are available.

### Federal Government

- Emergency Support Function Annexes: Introduction (January 2008)  
<https://www.fema.gov/pdf/emergency/nrf/nrf-esf-intro.pdf>
- ICS Forms Booklet FEMA 502-2 (September 2010) (Including ICS 213, ICS 213 RR, and ICS 260 series)  
[https://www.fema.gov/media-library-data/20130726-1922-25045-7047/ics\\_forms\\_12\\_7\\_10.pdf](https://www.fema.gov/media-library-data/20130726-1922-25045-7047/ics_forms_12_7_10.pdf)
- National Incident Management System (NIMS) (October 2017) (including detailed information on the Incident Command System)  
[https://www.fema.gov/media-library-data/1508151197225-ced8c60378c3936adb92c1a3ee6f6564/FINAL\\_NIMS\\_2017.pdf](https://www.fema.gov/media-library-data/1508151197225-ced8c60378c3936adb92c1a3ee6f6564/FINAL_NIMS_2017.pdf)
- Public Law 105–381, 105th Congress: Pacific Northwest Emergency Management Arrangement (PNEMA) (November 1998)  
<http://uscode.house.gov/statutes/pl/105/381.pdf>

### Multi-State Systems

- Emergency Management Assistance Compact (EMAC) Homepage  
<https://www.emacweb.org/>
- Emergency Management Assistance Compact (EMAC) Operations Manual, Version 3.0  
<https://mil.wa.gov/uploads/pdf/LogisticsResources2/EMACOperationsManual2013.pdf>
- Pacific Northwest Emergency Management Arrangement (PNEMA) Operations Manual and Standard Operating Procedures, Revised May 2016  
<https://mil.wa.gov/uploads/pdf/LogisticsResources2/pnema--ops-manual-and-sop-2016.pdf>

### State Governments

#### *State of Oregon*

- Executive Order No.16-07, Governor of Oregon  
[http://www.oregon.gov/gov/Documents/executive\\_orders/eo\\_16-07.pdf](http://www.oregon.gov/gov/Documents/executive_orders/eo_16-07.pdf)
- Inter-County Omnibus Mutual Aid Agreement (2010)  
[http://www.ocem.org/docs/Inter-County%20MAA\\_2010%20Rev\\_Final.pdf](http://www.ocem.org/docs/Inter-County%20MAA_2010%20Rev_Final.pdf)
- Managing Oregon Resources Efficiently (MORE) Homepage  
<http://www.MOREoregon.com>
- Managing Oregon Resources Efficiently (MORE) (March 2013)



[www.co.marion.or.us/PW/Roads/MORE/Documents/moreiga.pdf](http://www.co.marion.or.us/PW/Roads/MORE/Documents/moreiga.pdf)

- Manual Tracking Requests for Assistance (RFAs) (Draft)
- Master Interlocal Mutual Law Enforcement Assistance Agreement
- Master RFA (Spreadsheet)
- Multi-Agency Intergovernmental Agreements in Oregon that generally apply to Public Works and Emergency Management (as of September, 2016)  
<http://www.co.marion.or.us/PW/Roads/MORE/Documents/MultiAgencyIGAInfo.pdf>
- Mutual Aid and Assistance Agreement for the Provision of Emergency Services Related to Water and Wastewater Utilities (ORWARN)  
[http://orwarn.org/files/OrWARN%20Agreement%20modified%20April%202009%20\(Indemnity\).pdf](http://orwarn.org/files/OrWARN%20Agreement%20modified%20April%202009%20(Indemnity).pdf)
- Oregon Fire Service Mobilization Plan (2017)  
[http://www.oregon.gov/osp/SFM/docs/2017\\_MobPlanFinal.pdf](http://www.oregon.gov/osp/SFM/docs/2017_MobPlanFinal.pdf)
- Oregon Public Works Emergency Response Cooperative Assistance Agreement  
<https://services.oregon.gov/ODOT/Maintenance/Documents/public%20works%20agreement%20with%20signature.pdf>
- Oregon Public Works Emergency Response Cooperative Assistance Agreement Members (February 2017)  
[http://www.oregon.gov/ODOT/Maintenance/Documents/pwma\\_members.%20.pdf](http://www.oregon.gov/ODOT/Maintenance/Documents/pwma_members.%20.pdf)
- Oregon Revised Statute (ORS) 402.105 Emergency Management Assistance Compact (EMAC) (2015)  
<https://www.oregonlaws.org/ors/402.105>
- Oregon Revised Statute (ORS) 402.200 Intrastate Mutual Assistance Compact (2015)  
[https://www.oregonlegislature.gov/bills\\_laws/ors/ors402.html](https://www.oregonlegislature.gov/bills_laws/ors/ors402.html)
- Oregon Revised Statute (ORS) 402.250 Pacific Northwest Emergency Management Arrangement (PNEMA) (2015)  
<https://www.oregonlaws.org/ors/402.250>
- Public Health Emergency Preparedness (PHEP) Cooperative Agreement  
<https://www.cdc.gov/phpr/pubs-links/2017/documents/Oregon2017.pdf>
- Resource Requests: Asking for help from the State ECC
- State ECC RFA (Draft)
- State ECC RFA: Assigning to an ESF
- State ECC RFA: Processing by an ESF Lead

### *State of Washington*

- Intergovernmental Agreement for EMAC and PNEMA Assistance Between Washington Military Department and [Jurisdiction Name]  
<https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-pnema-iga---final.pdf>
- Resource Request Process: Requesting and Tracking resources in the State of Washington  
<https://mil.wa.gov/uploads/pdf/logistics-resources/statewide-resource-request-process.pdf>
- Revised Code of Washington (RCW) Chapter 38.10.010 EMAC  
<http://app.leg.wa.gov/RCW/default.aspx?cite=38.10.010>
- Revised Code of Washington (RCW) Chapter 38.56 Intrastate Mutual Aid System (Washington Mutual Aid Compact) (2011)  
<http://app.leg.wa.gov/rcw/default.aspx?cite=38.56&full=true>
- Understanding EMAC for Washington State

[https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-intro-thru-reimbursement\\_dec2016.pdf](https://mil.wa.gov/uploads/pdf/LogisticsResources2/emac-intro-thru-reimbursement_dec2016.pdf)

- WA Military Department Emergency Management Division State Emergency Operations Center (SEOC) Smartbook  
<https://mil.wa.gov/uploads/pdf/LogisticsResources2/compressed-smartbook-file.pdf>
- WA Resource Request Form (ICS 213 RR)  
[https://mil.wa.gov/uploads/pdf/LogisticsResources2/wa-resource-request-form\\_ics-213-rr\\_fillable.pdf](https://mil.wa.gov/uploads/pdf/LogisticsResources2/wa-resource-request-form_ics-213-rr_fillable.pdf)
- WA State Emergency Operations Center 2017 Logistics Section Standard Operating Procedure (SOP)  
<https://mil.wa.gov/uploads/pdf/LogisticsResources2/seoc-sop-log-for-web2917.pdf>
- Washington State Fire Services Resource Mobilization Plan (June 2017)
- Washington Mutual Aid System: Statewide Process and Procedures as approved by the Emergency Management Council  
<https://mil.wa.gov/uploads/pdf/logistics-resources/wamas-statewide-training.pdf>
- Mutual Aid and Assistance Agreement for Washington State for Intrastate Water/Wastewater Agency Response Network (WA WARN)  
<https://wawarn.org/documents/warn-mutual-aid-agreement.pdf>

## Regional Organizations

### *Portland Metropolitan Region*

- Intergovernmental Agreement for the Sharing of Emergency Operations Center Personnel within the Greater Portland Metropolitan Region when Personnel are Unable to get to Their Normal Reporting Location (EOC Stranded Worker Agreement)  
<https://www.portlandoregon.gov/rdpo/article/590311>
- Logistics Section in the EOC Training Course: Administrative and Instructor's Guide (May 2014)
- Memorandum of Understanding: Hospital/Health System Facility Emergency Mutual Aid (April 2015)  
<https://multco.us/file/62842/download>
- Portland Metropolitan Region's Multi-Agency Coordination System Concept of Operations (October 2017)  
<https://www.portlandoregon.gov/rdpo/article/664814>
- Portland Urban Area Regional Logistics Support Plan
- Regional Multi-Agency Coordination Group and Support Organization Handbook (November 2015)  
<https://www.portlandoregon.gov/rdpo/article/552005>
- WebEOC Resource Request Board Instructions (August 2012)

## Local Governments and Authorities

### *City of Portland*

- Delegation of Authority for Local Emergency
- ECC Finance Section SOP (January 2017)
- Paper Resource Request Process Job Aide (March 2017)
- WebEOC Resource Request Board Procedures (August 2012)

### *Clark County*

- Clark Regional Emergency Operations Center: Ordering Point Agreement
- Clark Regional Emergency Operations Center: Ordering Point Meeting Agenda
- Clark Regional EOC (CREOC) Procedure: Establishing the CREOC as an Ordering Point for an Agency (January 2013)
- Clark Regional EOC Procedure: Resource Ordering (January 2012)
- CREOC Resource Order Log (Spreadsheet)
- CRESA ICS 308 Adapted: Resource Order Form (July 2015)
- ICS 259-13 Resource Order: Overhead (Spreadsheet)
- ICS 259-15 Resource Order: Supplies (Spreadsheet)
- ICS 259-3 Resource Order: Crews-Personnel (Spreadsheet)
- ICS 259-9 Resource Order: Equipment (Spreadsheet)
- Resource Request Message (ICS 213 RR) Adapted (May 2012)

### *Multnomah County*

- Assistance Request (ECC 213 AR), Adapted for Multnomah County (April 2015)
- Multnomah County Resource Request Form (August 2017)

### *Tualatin Valley Fire & Rescue (TVF&R)*

- Declaration of Emergency for TVF&R (April 2017)
- Fire Operations Center (FOC) Checklists (March 2015)
- Logistics Section Chief On-Scene Considerations (March 2016)
- Resource Order Form (ICS 308A) (April 2013)
- Tualatin Valley Fire and Rescue Board Policy Handbook Section 9 (Purchasing) (June 2016)
- Tualatin Valley Fire and Rescue Standard Operating Guidelines Number 6.8.2 (Purchasing Policies and Procedures) (November 2016)
- Tualatin Valley Fire and Rescue Standard Operating Guidelines Number 6.8.5 (Special Procurements and Exemptions) (January 2017)

### *Washington County*

- Intergovernmental Agreement: Emergency Management Cooperative of Washington County [http://www.ocem.org/docs/EMC%20IGA%20Update\\_2017\\_Final.pdf](http://www.ocem.org/docs/EMC%20IGA%20Update_2017_Final.pdf)
- Multi-Agency Intergovernmental Agreements in Oregon that generally apply to Public Works and Emergency Management (September 2016)
- Washington County EOC Resource Process Form Directions (May 2015)
- Washington County EOC Resource Request Form (August 2016)
- Washington County EOC Resource Request Form Directions (September 2016)
- Washington County EOC Resource Requesting and Ordering Process
- Washington County WebEOC Resource Request Board Instructions – County EOC Controller (June 2017 Draft)
- Washington County WebEOC Resource Request Board Instructions for the Requestor (January 2016)

# Annex A: Handbook Overview and Management

## Project Background and Scope

The *Emergency Resource Request Management Handbook* project addresses a need first identified in 2010 in the *Regional Resource Management Capabilities Assessment and Gap Analysis*. The 2010 report found that “[t]here is no standard protocol for resource ordering or brokering performed by EOCs and MACs” and recommended that the region “develop the guidelines and procedures that collectively provide a standard protocol for resource ordering.” While several agencies within the region have worked to improve their resource ordering processes since the 2010 report, several incidents and exercises within this period suggest that more work is needed to ensure the region’s readiness to process resource requests in a fast and efficient manner.

## Implementation and Maintenance

The *Handbook* is designed to be referenced by three types of audiences as shown in the table below.

**Table 25: Audience and Relevant Sections of the Handbook**

Audience/User	Description	Relevant Sections of the <i>Handbook</i>
<b>Resource Requesters</b>	Governmental or non-governmental organizations who need resources in order to complete their response missions or responsibilities during an emergency.	<ul style="list-style-type: none"><li>• Introduction</li><li>• Getting Started</li><li>• Resource Requester Guide</li><li>• Mutual Aid Channels</li><li>• Resource Request Form</li><li>• Incident Finance and Administration Worksheet</li><li>• Delegation of Authority Forms</li><li>• Key Questions for Resource Requests</li><li>• Non-Competitive Procurement Guidelines</li><li>• Resource Contact Algorithm</li></ul>
<b>Resource Request Managers</b>	Stakeholders within a DOC or an EOC who are responsible for processing resource requests.	<ul style="list-style-type: none"><li>• Introduction</li><li>• Getting Started</li><li>• Resource Request Management Guide</li><li>• Mutual Aid Channels</li><li>• Resource Request Form</li><li>• Resource Request Tracking Sheet</li><li>• Non-Competitive Procurement Guidelines</li></ul>
<b>Regional Resource Request Stakeholders</b>	Resource management stakeholders in the PMR who should coordinate to determine resource needs and availability of resources from their	<ul style="list-style-type: none"><li>• Introduction</li><li>• Getting Started</li><li>• Regional Resource Request Management Coordination</li></ul>

Audience/User	Description	Relevant Sections of the <i>Handbook</i>
	organization to meet the needs of the requesting organizations.	<ul style="list-style-type: none"> <li>• Mutual Aid Channels</li> <li>• Resource Request Form</li> <li>• Regional Coordination Call Agenda</li> </ul>

The relevant audiences should reference and use the guidance and tools included in the *Handbook* during exercises and incidents requiring emergency ordering of resources to support the completion of response or recovery missions.

### *Maintenance*

The Regional Disaster Preparedness Organization Resource Management Committee should review the contents of the *Handbook* at the following points to ensure it is up-to-date with all relevant regulations, policies, and processes in the PMR. The *Handbook* should be reviewed:

- After an exercise or event involving the use of resource request management processes to validate the guidance and tools;
- As additional regional documentation is developed that impact regional coordination or resource request management within the PMR; and
- Every three years to comprehensively review the guidance and tools to ensure alignment with current standards and processes.