DISASTER PROCUREMENT GUIDEBOOK

SPS State **PROCUREMENT** SERVICES
Oregon Department of Administrative Services

Website: http://www.oregon.gov/DAS/EGS/ps/Pages/DisasterPreparedness.aspx

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Roles and Responsibilities

This section defines the duties for the Coordinating Supervisor and the Buyer.

The Event Tracking Status Report is to be used by the Coordinating Supervisor to report procurement status back to the State of Oregon Emergency Operations Plan Emergency Coordination Center (ECC) or individual Agency Operations Centers (AOC) at the end of a shift. It may also be used by the Buyer to report status of Events at the end of a shift.

It also points to the tabs defining the roles of others.

Coordinating Supervisor (DAS SPS)

Duties and Responsibilities

1. Acts as the liaison between the ECC and the Coordinating Agency on disaster event procurement actions.

2. Has been trained on Incident Command System principles and practices.

3. Works with Coordinating Agency to ensure proper procurement and financial staffing is available to meet the declared event's needs utilizing internal staff.

4. If additional personnel are required, contacts DAS CHRO Resource Coordinator. CHRO will work with other state agencies to locate necessary staffing. (See Disaster Resource Coordination Section)

5. Use Incident Command System (ICS) principles to establish organization structure, reporting procedures and lines of communication for assigned resources. (See Appendices section)

6. When personnel from other agencies are identified, the coordinating supervisor works with the appropriate procurement and financial staff to establish lines of communication and processes to be used during the event. Confirm dispatch and estimated time of personnel availability with CHRO.

7. Maintains situational awareness by reading situation status reports, attending command staff meetings as requested, monitoring Ops Center for resource requests and provides adequate incident information to subordinate staff, including their personnel assignments.

8. Ensure that all procurement information is provided to the ECC after completion of the purchase.

9. Ensure all assigned staff are properly briefed and check in as a resource.

10. Attend briefings and planning meetings as appropriate.

11. Report to appropriate entities with status updates as requested and appropriate.

12. Ensure all personnel and assigned equipment are accounted for and returned at the close out of the incident.

13. Ensure that at the time of a personnel shift change the Event Tracking Status Report (Form DP100) documents as well as all Event Logs are provided to the next shift Coordination Supervisor.

14. Inform HRSD of any staffing changes assigned to the incident.

15. Monitor and inspect progress of order fulfillment.

16. Keep management informed of situations and resource status.

17. Ensure all necessary equipment is available to assigned personnel and issued equipment is returned at the end of the incident.

18. Inform CHRO of any problems with assigned resources.

19. Transfer position duties to other shift managers to ensure continuity in process. Provide Event Tracking Status Report (Form DP100) at the end of the shift.

20. Perform after incident hotwash, to identify problems, successes, and areas of process improvement. May be asked to provide a formal After Action Report. Develops recommendations for improvement plans and participates in implementing improvement actions as approved.

Buyer

Duties and Responsibilities

1. Understands what authority and rules the procurements will follow and becomes familiar with required forms during a declared disaster.

2. Uses Event Logs and Financial Tracking Logs to track procurements. (See Disaster Event Log and Finance Tracking sections)

3. Uses OregonBuys, if available, to find contracts or as a resource to locate potential suppliers to provide needed supplies or services. (See OregonBuys section)

4. Contacts suppliers to negotiate supplies delivery, and requested services and all associated costs. Finalizes how supplies will be delivered and the payment methodology.

5. If a purchase is for more than $25,000, the buyer must attempt to obtain three bids when practical to ensure competitiveness and meet legal requirements. Seach the COBID certified vendor directory for potential suppliers for good/services needed. https://www.oregon.gov/biz/programs/cobid/pages/default.aspx

6. Confirms delivery and documents on appropriate forms. (See Disaster Event Log and Finance Tracking sections)

7. If unable to complete any procurement, retains records and notifies the Coordinating Supervisor. As necessary, returns or supplies the Coordinating Supervisor and / or Finance Coordinator with any documents that may have been initiated, as appropriate.

8. At the end of the declared disaster event, provides all documentation, including all Event and Financial Tracking Logs, to the Finance Coordinator. (See Disaster Event Log and Finance Tracking sections)

Other Duties

SPOTS Card Holder Duties (See Payment Information Section)

Finance Supervisor Duties (See Finance Tracking Section)

Form DP100 - Event Tracking Status Report

Incident #	Date	Time	Requester (Who Called)	Request Summary	Buyer (Name)	Task Completed	Additional Action Required

Procurement Process

Start the Procurement Process

Procurement Process – The flow chart is designed as a process guide for the procurement officer. The chart is designed as a step-by-step procedure guide that starts when the buyer receives the purchase request from the Coordinating Supervisor during a Governor declared disaster through the delivery of the supplies or services.

Special Procurement (See Appendices section) – The Special Procurement supports the procurement process and gives the Agency the authority to respond to procurement needs in a fast and flexible way during a declared disaster. The Special Procurement can only be used when responding to a Governor or Governor's designee declared disaster and ends once the Governor or Governor's designee terminates the state of disaster.

Form DP200 - Procurement Process Flow Chart

SPS STATE **PROCUREMENT** SERVICES
Oregon Department of Administrative Services

FORM DP200
Disaster Procurement Process
Procurement Steps for Disaster Response
Initial Response to Stabilization
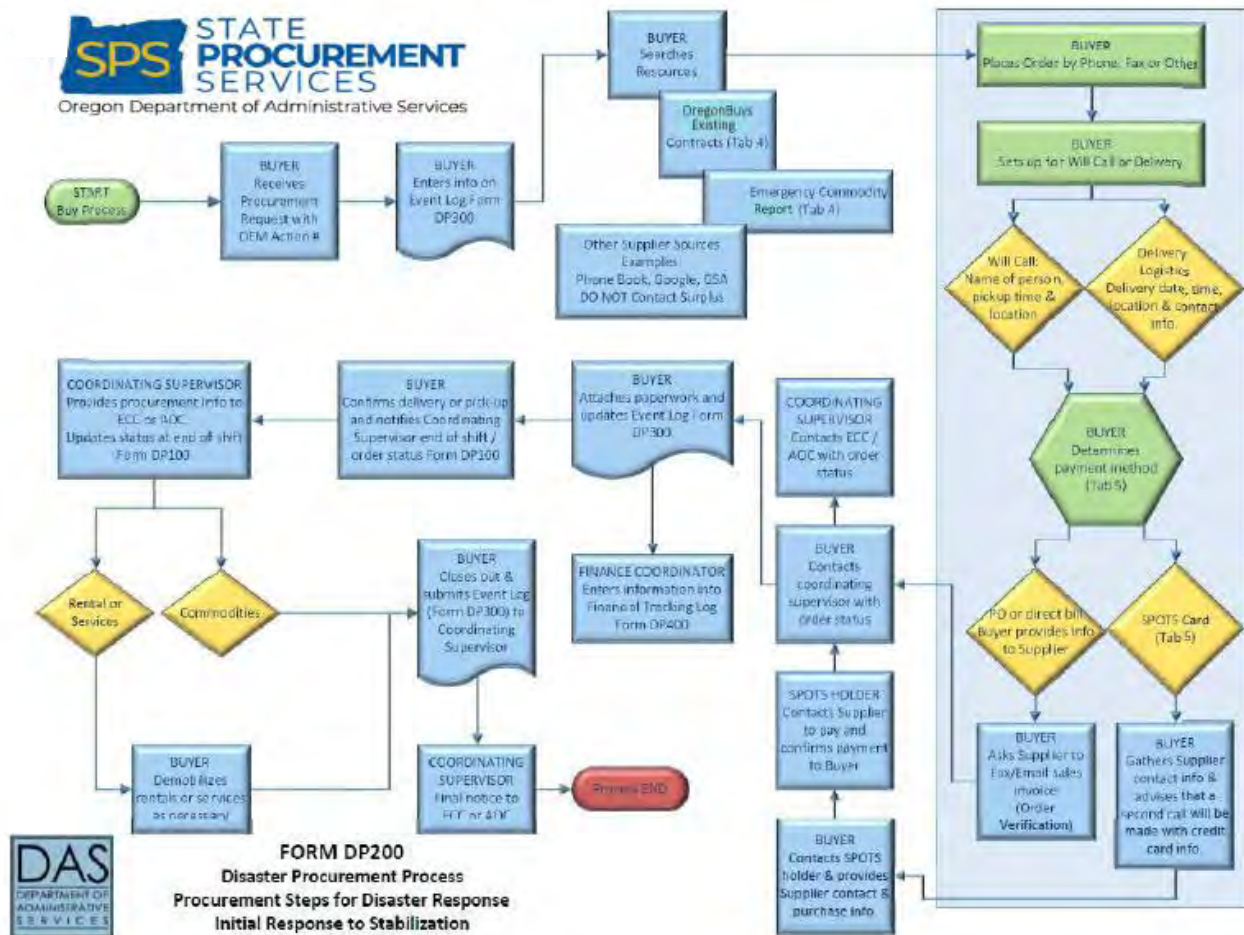
Procurement Process Guide [See Form DP200]

1. Buyer is identified
2. Start Buy Process
3. Buyer receives Procurement request with ODEM Action number
4. Buyer enters info on Event Log [Form DP300]
5. Buyer searches resources
6. Buyer places order
7. Buyer sets up for Will Call or Delivery
8. Buyer determines payment method
   a. PO or Direct Bill
      i. Buyer provides PO or Direct Bill info to Supplier
      ii. Buyer asks Supplier to FAX or Email Sales Invoice for order verification
      iii. Buyer contacts Coordinating Supervisor with order status
      iv. Coordinating Supervisor contacts ECC/AOC with order status
   b. SPOTS Card
      i. Buyer gathers Supplier contact info & advises that a second call will be made with credit card information
      ii. Buyer contacts SPOTS card holder and provides Supplier contact and purchase information
      iii. SPOTS card holder contacts supplier to pay and confirms payment to Buyer
      iv. Buyer contacts Coordinating Supervisor with order status
      v. Coordinating Supervisor contacts ECC/AOC with order status
9. Buyer attaches paperwork and updates Event Log [Form DP300]
   c. Buyer supplies information to Finance Coordinator to enter into financial tracking log [Form DP400]
10. Buyer confirms delivery or pick-up and notifies Coordinating Supervisor
    d. Buyer provides status of orders to Coordinating Supervisor at end of shift [Form DP100]
11. Coordinating Supervisor provides procurement information to ECC or AOC and updates status at end of shift [Form DP100]
    e. Rental or Services
       i. Demobilizes rentals or services as necessary
       ii. Buyer closes out and submits Event Log [Form DP300] to Coordinating Supervisor
       iii. Coordinating Supervisor gives final notice to ECC or AOC
    f. Commodities
       i. Buyer closes out and submits Event Log [Form DP300] to Coordinating Supervisor
       ii. Coordinating Supervisor gives final notice to ECC or AOC
12. Process End

Disaster Event Log - [Form DP300]

This form [Form DP300] is filled out for each purchase. It captures all of the information needed to ensure the correct items or services go where they are needed. The form is to be attached to the receipts and any e-mail correspondence to create a packet. The resulting packet will need to be kept for possible FEMA reimbursement.

Form DP300 – Disaster Event Log

ODEM Action No: _____   Incident No: _____
(Required)

For goods and services purchased under Special Procurement No. 228.08 or ORS 190 to support declared disasters

I. Emergency Request Information	Primary Contact (Mgr):	
A. **Today's Date** & Time		
B. Who is making request?		
C. How can requestor be reached?	Phone #: Location:	
D. What AOC or ECC are you calling from?		
E. How can I help? (*What Goods/Services are needed, Qty, Other items*)		Procurement Type: ☐ Commodity ☐ Rental/Lease ☐ Service
F. Is there an alternate contact?	Name: Phone #:	
G. Where am I deploying the goods/services to? (*location, address, landmarks, etc.*) When needed?		Deployment Method: ☐ Will Call ☐ Delivery ☐ Other
H. Will Call Pickup Contact:	Name: Phone #:	
I. Delivery Location Contact:	Name: Phone #:	

II. Deployment Order Information	Primary Contact (Buyer):	
A. Company / Agency Name		☐ COBID
B. Contact Person	Name: Phone #:	
C. Goods / Services Ordered		
D. Estimated Pricing Info		
E. E.T.A. (*estimated time of arrival*)		
F. Payment Method / PO #	☐ PO # ☐ SPOTS Cardholder Name: ☐ State Contract PA #:	☐ Invoice Phone:
G. Order/Quote # & Date of Purchase	Order/ Quote #	Date Purchased:
H. Delivery Confirmation	Name:	Date Delivered:
I. ☐ Task Completed	Date Completed:	

III. Demobilization Order Information	Primary Contact (Buyer):	
A. Contact Person	Name:	Phone #:
B. Goods / Services Removed Date Removed: _____		
C. Final/Actual Price Information Attach any Invoices		
D. E.T.R. (estimated time of removal)		
Attach any e-mail documents		

NOTES:

Emergency Request:

Contractor Deployment (Buyer Name):

Demobilization (Buyer Name):

Disaster Event Log Instructions

ODEM Action Number: This number will be provided to you by the Emergency Command Center. Enter this number here.

Incident No: If your office uses an internal tracking number, enter that number here.

Emergency Request Information Primary Contact Manager: Enter the primary point of contact for your office while on emergency status. This will be the person who is the point of command.

Today's Date and Time: Enter Date and Time of request.

Who is making the request? Enter the name of the person making the request.

How can requestor be reached? Enter the phone and location of the requestor.

What Agency or ECC? Enter the Agency Name or ECC.

How can I help? Get as much information as possible on the types of goods or services they need. Be sure and ask for quantities and if they need accessory items. For example, if they ask for tarps, will they need hammers and nails to hold the tarps down? Flashlights? Will they need extra batteries?

Is there an alternate contact? Get an alternate contact or contacts name and phone number

Where am I deploying? Get the address of where goods are to be delivered. Also check to see if there is a specific location. Example: ODOT maintenance yard, next to water tower, etc.

Receiving contact: Get the name and phone number of the person receiving the goods.

Deployment Order Information Primary Contact (Buyer): Enter in the buyer's name who ordered the supply or service for this request.

Company/Agency Name: Enter in the name of the Company/Agency where good or service is purchased from.

OMWESB Box: Check if you know if this company is a member of MWESB.

Contact Person: Enter in the contact's name and phone number for the Company/Agency the good or service is purchased from.

Goods/Services Ordered: Enter a description of the goods and services, including quantities and brand names.

Estimated Pricing information: Enter the estimated cost for this order.

E.T.A: Enter the estimated delivery time of arrival to the deployment location above. If it will be a will call, enter the estimated time available for pick-up.

Payment method / PO: Check the appropriate box and enter in the appropriate information next to it. PO #: Enter the PO number provided from ODEM on the PO Log Sheet.

Invoice: Check if an invoice was issued for payment.

SPOTS Card: Enter in the name and phone number of the SPOTS Card holder who will pay for the purchase.

State Contract PA #: Enter the Price Agreement number that the good/service was ordered from.

Order/Quote #: Enter the order, quote or invoice number.

Date of Purchase: Enter the purchase date of the good or service.

Delivery Confirmation: Enter the name and date of the person who confirmed receiving the good or verifying the service was completed.

Task Completed: Check box when all aspects of the Deployment Task are completed and enter the date of completion.

Demobilization Order Information Primary contact (Buyer): Enter the name of the buyer responsible for demobilizing the good/service.

Company name: Enter the company name providing the good/service.

Contact Person: Enter the name and phone number of the point of contact for the company providing the good/service.

Goods/Services removed: Enter the date and description of the goods and services removed. Final/Actual Price: Enter the final price for the good or service provided.

E.T.R.: Enter the estimated time of removal for the good or service.

Use the back side of the form to enter in any additional information regarding the Emergency Request, Contractor Deployment and Demobilization.

Whenever placing a phone order, always ask for a copy of the invoice or packing slip to be faxed to you and attach to the Disaster Event Log. Also attach any e-mail communication that pertains to the goods or services requested.

State eProcurement System OregonBuys

State eProcurement System is the first source to be searched for emergency commodities. There is a report that you can generate called Emergency Commodities Report that returns a listing of registered state eProcurement System suppliers indicating they can provide the commodity that you are searching on.

Contracts are flagged for use in a disaster; if you run the Emergency Index you can ask it to return in Excel format which returns a list of contractors that are on existing price agreements. These reports will contain information such as vendor names, addresses and phone numbers.

If you do not have an OregonBuys login, you can obtain one from your Agency by contacting:

Supplier Help Desk
Please contact us at support.oregonbuys@das.oregon.gov or 1-855-800-5046 for assistance.

State Agency / OrCPP User Help Desk
Please contact us at epro-support@periscopeholdings.com or 1-888-472-9102 for assistance.

Searching Existing Awards in State eProcurement System

1. Go to the OregonBuys website: https://oregonbuys.gov/bso/view/login/login.xhtml (A log in is not needed to search for contracts but is needed to purchase using the site. Which may not be possible during an emergency.)

2. In the search bar, type the item needed.

3. Click the arrow next to Bid Solicitation, in the drop-down menu choose "blanket", then click the magnifying glass.

4. If what you are looking for doesn't come up move to the Advanced search below.

Advanced Search

1. Go to the OregonBuys website: https://oregonbuys.gov/bso/view/login/login.xhtml (A log in is not needed to search for contracts, but ius needed to purchase using the site. Which may not be possible during an emergency.)

2. Click the word Advanced by the magnifying glass.

3. Click the arrow on the right of Select Document Type, select Blankets

4. In the next screen you can search many different ways in this screen.

5. Once you enter the criteria you want to search, click find it at the bottom of the screen.

6. Choose the contract that may have what you are looking for.

7. All attachments, contact information, and a Buyer's Guide will come up for you to view.

How to Run Reports

1. Go to the OregonBuys website: https://oregonbuys.gov/bso/view/login/login.xhtml

2. Log in to the website.

3. Click on the upper right, gear icon, choose Reports.

4. Click on the report you wish run. At the bottom of the screen is Emergency Vendors.

*Note: if you are looking for a specific item in reports, you will need to export the report in Excel and manually clean up the report.

Search Assistance Items

The next page has a list of common commodities to search for.

Emergency Commodity List

	Commodity Listing	NIGP Code
5	Batteries	450-06
6	Blankets	850-12
7	Bleach	505-25
8	Camping Equip (Cots, Lanterns, etc)	450-15
9	Cleaning Products	192-00
10	Diesel (marine)	405-09-36
11	Diesel (motor fuel)	405-09-35
12	Disposal/Removal of Dead Animals	962-25
13	Disposable Tableware	240-00
14	Drinking Water	390-91
15	Emergency Shelter	952-37
16	Emergency Food	952-36
17	Emergency Shower	345-18
18	Extension Cords	285-95
19	Fencing	330-00
20	First Aid	345-00
21	Flashlights (battery op)	450-32
22	Flood Lights	055-54-48
23	Gasoline	405-15
24	Generator	285-37
25	Hammer	445-38-40
26	Hand Sanitizer	485-13-50
27	Hand Tools/Shovels	445-00
28	Hardware (buckets,ladders, nails,etc)	450-00
29	Helicopter Rental	975-11
30	Infant Formula	271-28-15
31	Janitorial	485-00
32	Leather Gloves	201-40
33	Matches	393-56-51
34	Non-Latex Gloves	201-42-61
35	Paper Towels/Toilet Paper	640-75
36	Parmaceuticals	269-00
37	Pillows	850-63
38	Plywood (exterior)	540-59-09
39	Portable Kitchens	155-69
40	Portable Toilets	155-70
41	Propane and Butane	405-03
42	Propane Heaters	981-00
43	Radio AM/FM (battery op)	
45	Rental of Backhoe, Excavator, Loader, etc	975-34-26
46	Rental of Backhoe, Excavator, Loader, etc (Service w/operator)	975-35-20
47	Rental of Dump Trucks	975-86-57
48	Riprap	913-50
49	Ropes	450-24
50	Rubber Boots	800-25
51	Sand Bags and Sand	085-55
52	Snow Shoes	805-65-71
53	Snowmobile	071-76
54	Tents/Tarpaulins	450-77
55	Two-Way Radio (portable, including vehicle relay)	725-74
56	Two-Way Radio Receivers, Transmitters, Transceiver	725-78
57	Water/Wastewater Treatment Services	968-96
58	Water Filtration (conditioning, purification equip)	670-86
59	Water Filtration (equip & access)	890-24
60	Water Hoses	460-30

Payment Information

This section covers the State's policy on SPOTS (Small Purchase Order Transaction System) cards (aka procurement cards or P-cards) during a disaster. It covers the process to raise card limits, the needed documentation requirements and the role of the SPOTS card holder.

Follow agency specific instructions for purchase orders and invoicing.

Each agency needs to keep all financial documentation for FEMA reimbursement

SPOTS Card Holder

(Small Purchase Order Transaction System – aka Procurement Card or P-card)

Duties and Responsibilities:

1. NOTE: Even though a disaster has been declared, the card holder must comply with the same documentation requirements applicable to all purchase transactions (e.g. receipts, supplier invoices) while utilizing the SPOTS card.

2. If contacted by a buyer during a declared disaster and your card has sufficient funds available, call supplier and provide card information

3. If the card does not have sufficient funds and the card holder has the ability

4. Gets documentation from supplier and ensures that the buyer also has a copy of the invoice and any packing slips.

5. Gets information from buyer so card holder can track on required documentation.

SPOTS Card Use During Disasters

SPOTS Card Standard Limits

SPOTS cards are available for use during declared disasters. Typically, most SPOTS card holders have limits of $2,500 (the standard limit) to $7,500 which is the maximum allowed with approval at the Agency level. Higher limits are available, however, with the Department of Administrative Services (DAS) State Controller's Division (SCD) approval.

To request a higher limit on your SPOTS card, Agencies must submit a written request along with a SPOTS Card Account Information Record form signed by the Agency Approving Officer. You must include the reason for the increase, explaining the receipting and storage methods for the items purchased and explain how the Agency will use and store the card. Please see the Oregon Accounting Manual Statewide Policy Number 55.30.00, SPOTS Card Program, Section 117 for further information on this process.

SPOTS Card Disaster Request Process

You may also acquire a SPOTS card or increase the limit on an existing SPOTS card during a disaster through an expedited process. DAS SCD will expedite requests for SPOTS cards for disaster purposes and make the cards available within 24 to 48 hours. Credit increases up to $50,000 will go into effect within 2 to 4 hours of the request. Request for increases over $50,000 may take up to 24 hours to go into effect. Please see the Oregon Accounting Manual Statewide Policy Number 55.30.00, SPOTS Card Program, Section 114-146 for further information on this process.

SPOTS Card Activity Requirements

SPOTS cards not used within 90 days will be identified by the DAS SCD and notification will be sent to the Agency that the card has not been used. In order to keep your card active, the Agency SPOTS Approving Officer may submit documentation to DAS SCD to justify the active card status. For example, if your card is only used for disasters then the Agency SPOTS Approving Office may notify SCD that this is the only use for the card and the card can remain open without having regular charges on it.

Who May Use a SPOTS Card

An employee who has been issued a SPOTS card must secure and control the card at all times. Only the employee to whom a particular SPOTS card has been issued is allowed to make purchases using that card.

SPOTS Card Disaster Documentation Requirements

Disaster SPOTS card transactions must comply with the same documentation requirements applicable to all purchase transactions. All expenditures must be supported by copies of appropriate source documents, such as vendor invoices or receipts (merchant credit card receipts, alone, are not sufficient) and receiving records and they must be approved by individuals who have the appropriate level of signature authority. In addition, the use of a SPOTS card does not eliminate the requirements to (1) issue a purchase order for all purchases over $5,000 that are not part of a price agreement and (2) obtain competitive bids, particularly for purchases that are part of a FEMA project.

Agencies are reminded that all expenditure claims related to FEMA projects must be reasonable and necessary, authorized within the project's scope of work and directly benefit the project.

Financial managers should work with ECC/AOC to ensure their agency's SPOTS card reporting mechanisms generate the data required for reimbursement under federal and state disaster recovery programs.

Contacts for Questions and Requests

For additional information or to find out how you can obtain the services of SPOTS, DAS SCD Statewide Financial Management Systems (SFMS) call (503) 373-1044.

How to Get a SPOTS Card and Increase Limits

Oregon Accounting Manual (OAM) Policy 55.30.00 – SPOTS Card Program sets for the minimum standards for processing purchase transactions using the State of Oregon's Small Purchase Order Transaction System (SPOTS) card. The SPOTS card program was implemented to eliminate costly paperwork and to expedite the process of making purchases, thus, saving the State time and money. The SPOTS card, which is an important tool under normal circumstances, may be even more valuable during a disaster.

Request a SPOTS Card

To request a SPOTS card, the potential cardholder must complete the Purchase Card Application and Agreement form (OAM 75.55.02.FO). As long as the credit limit is $7,500 or less and the request has been signed by the agency's Approving Officer, the request may be processed directly by the agency's SPOTS Card Coordinator using the US Bank's (Bank) web-based system. The new SPOTS card will be issued in the name of the employee and the state agency responsible for the card's usage, based on the information contained in the signed Purchase Card Account Information Record (PCAIR) found on page 4 of the Purchase Card Application and Agreement.

Credit Limits

The standard credit limit for each credit card issued under the SPOTS card program is $2,500 per billing cycle. The agency Approving Officer may authorize increases (up to $7,500) or decreases in the credit limit. The credit limit decision should be based on anticipated need and frequency of use and the cardholder's employment classification and job responsibilities.

Requests to increase the credit limit above $7,500 require the additional approval of the State Controller's Division (SCD), Statewide Financial Management Services (SFMS) Section. Agencies must submit a new PCAIR form signed by the Approving Officer and attach a written explanation that describes the reason for the increase and the controls and safeguards in place to ensure proper receipting of physical assets and appropriate use and storage of the card.

Expediting Procedures During a Disaster

In a disaster situation, the request for a SPOTS card can be expedited. Cards can be issued and made available to new users within 24 to 48 hours after the Bank receives the request

and is notified it is for disaster purposes. If the request is submitted early in the morning, the new SPOTS card will be delivered the next day; if the request is submitted after the bank's normal delivery/pick-up time, the card will be delivered within 2 days. The delivery location can also be pre-determined at the time of request. *(NOTE: The Bank is not available to process disaster requests evenings, weekends or holidays.)*

In a disaster, requests to increase the credit limit of an existing cardholder can also be expedited. Credit limit increases up to $50,000 become effective within 2-4 ours of the "disaster" request. Requests to increase the credit limit over $50,000 may take up to 24 hours. In either case, any request to increase a cardholder's monthly credit limit above $7,500 requires the approval of SFMS. Agencies must submit a new PCAIR form, signed by the Approving Officer, along with a written explanation that (1) states the request to increase the spending limit is due to a disaster situation; (2) describes the controls and safeguards in place to ensure proper receipting/tracking of disaster purchases; and (3) discusses the controls in place to ensure the proper use and storage of the SPOTS card. The request forms may be faxed to SFMS. *(NOTE: The Bank cannot process disaster credit limit increases evenings, weekends or holidays.)*

Selection and Training of Disaster SPOTS Cardholders

SPOTS Cards are non-transferable, meaning that a SPOTS card cannot be used by anyone other than the named cardholder to make a purchase – not even in a disaster. For this reason, agencies should carefully consider whether key personnel expected to be involved in disaster recovery activities should also be SPOTS cardholders. Agencies must also decide whether to request "disaster" SPOT cards in advance or wait until a disaster actually occurs. If the decision is to delay, agencies must keep in mind that communication networks, etc. could be adversely affected during a disaster which, in turn, could impact the effectiveness of the expedited procedures described above. Some of the issues that must be resolved at the agency level include the following:

a. Specifically, to whom should disaster SPOTS cards be issued? Should SPOTS cards be issued to administrators, deputies, field supervisors and other disaster responders? Or, because of their familiarity with procurement laws, administrative rules, and statewide policies, should disaster SPOTS cards be issued to key purchasing staff only?
If an agency decides to issue disaster SPOTS cards to purchasing staff only, the agency should also specify the minimum qualifications.
For example, management might decide that qualifying purchasing agents must have:
- A minimum of two years of experience at the level of a *Procurement & Contracts Specialist 2* or higher;
- A current *Oregon Procurement Basic Certification*; and
- A solid foundation in using statewide price agreements and the state eProcurement system.

b. What is the proper disaster spending limit for each of the potential disaster cardholders? The assumption is that it will be more than $7,500, but how much more?

c. Have existing SPOTS card policies and procedures that govern day-to-day processes been updated to include disaster operations, ensuring that:

- Disaster cardholders receive basic and refresher training on the proper use of a SPOTS card, including transaction documentation requirements;
- Disaster cardholders understand they must secure and control the cards at all times; and
- Disaster SPOTS card activity is consistently monitored on a week to week basis, not just during a disaster.

Documentation Requirements

Disaster SPOTS card transactions must comply with the same documentation requirements applicable to all purchase transactions. All expenditures must be supported by copies of appropriate source documents, such as vendor invoices or receipts (merchant credit card receipts, alone, are not sufficient) and receiving records, and they must be approved by individuals who have the appropriate level of signature authority. In addition, the use of a SPOTS card does not eliminate the requirements to (1) issue a purchase order for all purchases over $25,000 that are not part of a price agreement and (2) obtain three quotes minimum and document your procurement file and (3) do a competitive procurement if time allows.

If a purchase is for more than $25,000, the buyer must attempt to obtain three bids when practical to ensure competitiveness and meet legal requirements. Seach the COBID certified vendor directory for potential suppliers for good/services needed. https://www.oregon.gov/biz/programs/cobid/pages/default.aspx

Agencies are reminded that all expenditure claims related to FEMA projects must be reasonable and necessary, authorized within the project's scope of work and directly benefit the project. Renting and leasing are preferred for FEMA reimbursement. Purchasing communities may be denied FEMA reimbursement. Financial managers should work with ODEM to ensure their agency's SPOTS card reporting mechanisms generate the data required for reimbursement under federal and state disaster recovery programs.

Cardholder Information

Agencies should also make sure that a complete record of their cardholder information is stored at a secure secondary location.

Tracking Mechanisms

Agencies may find it useful to develop their own internal system to track SPOTS card purchases during a disaster to monitor spending, to share data among multiple users, and to facilitate post-disaster audits and analysis. Special recordkeeping procedures and advance training would be needed to instruct agency personnel how to log, track and report disaster purchase information (cardholder name, exact vendor name, exact dollar amount and description of goods or services purchased) to a central authority. For agencies currently using the Bank's Access online program to track and analyze SPOTS card activity, a new feature will soon be available that agencies can use to customize their reports.

One major benefit of using SPOTS cards to make disaster procurements is that the process ensures creation of a record of the purchases as evidenced by the monthly billing statement and the Bank's Access online program. Although neither of these resources constitutes sufficient documentation/authorization for payment purposes, together, they provide a starting point and reference numbers for follow-up and investigation when receipts go missing.

SPOTS Card Application

Link to Purchase Card Application and Agreement form [(OAM 75.55.02.FO)](#).

Financial Tracking

Agencies responding to disasters under appropriate authority may be able to recover some costs and expenses associated with their disaster procurements.

Should disaster-related expenses be reimbursable by any State or Federal Agency, each party shall file the appropriate request and paperwork for reimbursement of its costs. ODEM may be able to assist in the documentation for reimbursement.

This information is to be tracked by the Finance Supervisor or Coordinator and include information such as Purchase Order numbers by date / time, vendor cost information, commodity or service description, Agency requestor, and buyer assigned.

Finance Supervisor or Coordinator Duties

Duties and Responsibilities:

1. Acts as the liaison between the ECC/AOC and the Coordinating Agency for financial matters.

2. Manages all financial aspects of the incident.

3. Works with Coordinating Agency to ensure proper procurement and financial staffing is available to meet need.

4. Initiates communication plan to ensure continuity of information flow between parties and that all documentation follows requirements. Briefs all subordinates on all incident related finance issues needing attention and/or follow up.

5. Ensures all personnel time records are accurate and returned to appropriate personnel within the Coordinating Agency and sent to their home Agency.

6. Ensures all procurement records are properly prepared, completed, and returned to appropriate personnel within the Coordinating Agency.

7. Provide financial/cost updates for the incident as requested.

Finance Tracking Log Instructions

This spreadsheet is broken into three categories. SPOTS Card spend, ODEM Purchase Orders and Direct bill. Per FEMA requirements for reimbursement, complete this sheet by entering each line item purchased.

Field	*Instructions*
ODEM Action #	Oregon Emergency Management ECC/AOC Action number. Enter this number from the Disaster Event Log
PO #	The Purchase Order Number issued by the Contracting Agency. Enter this number from the Disaster Event Log.
SPOTS Card Use	Enter the name holder and contact number of the SPOTS card used for this transaction. (This is only applicable if a SPOTS card was used)
User / PO	Enter in the end user or PO Number
Incident Number	The Contracting Agency's internal tracking used. Enter this number from the Disaster Event Log.
Vendor Name	The vendor where the purchase occurred. Enter this number from the Disaster Event Log.
Item / Description	Enter a brief description of item purchased from packing slip or invoice from vendor.
Qty / Hrs	Enter the quantity purchased from packing slip or invoice from vendor.
Unit Price	Enter the unit price for the item purchased from the vendor.
Total Price	Spreadsheet will automatically calculate for you in the electronic version.
Date Purchased	Enter in the date purchased
Delivery Location	Enter in the general location of the delivery (e.g. Clatsop County or Tillamook)
Delivery Area	Enter in a more specific area if known.
Invoice Number	Enter in the invoice number from the packing slip or invoice
Purchase Amount	Spreadsheet automatically carries over from Total Price
Remaining Balance	The remaining balance available on the SPOT card used. Spreadsheet automatically calculates. Enter in the total available credit for the card on the top line of each card user section. (Blue box)
Inserting Additional Rows	If you need to insert additional rows into the spreadsheet, be sure and insert above the total line within the section to ensure the formulas remain intact.

FORM DP400 - Disaster Finance Tracking Log

ODEM ACTION #	PO #	SPOTS CARD USE		Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
		Card User 1	Contact Numbers													
		Beginning Credit														$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
		Sub-total Spend:								0					$0.00	$0.00

		Card User 2	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
				Beginning Credit												$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
				Sub-total Spend:						0					$0.00	$0.00

		Card User 3	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
				Beginning Credit												$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
				Sub-total Spend:						0					$0.00	$0.00

		Card User 4	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
				Beginning Credit												$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
				Sub-total Spend:						0					$0.00	$0.00

		Card User 5	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
				Beginning Credit												$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
				Sub-total Spend:						0					$0.00	$0.00

		Card User 6	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount	Remaining Balance
				Beginning Credit												$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
										0					$0.00	$0.00
				Sub-total Spend:						0					$0.00	$0.00

SPOTS Cards Total Spend:	$0.00
SPOTS Cards Remaining Credit Available	$0.00

OMD Purchase Orders (PO)

ODEM Action #	PO #	User/PO #	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
AGC Sub-total:															**$0.00**

Direct Bill

ODEM Action #	PO #	User/PO #	Contact Numbers	Incident #		Vendor Name	Item / Description	QTY / Hrs	Unit Price	Total Price	Date Purchased	Delivery Location	Delivery Area	Invoice #	Purchase Amount
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
										0					$0.00
PO Subtotal:															**$0.00**
Total Spend															**$0.00**

Disaster Resource Coordination

This document is to be used by the Coordinating Agency if they need to augment their staff during a disaster. It covers the process for requesting support, levels of support, and reimbursement.

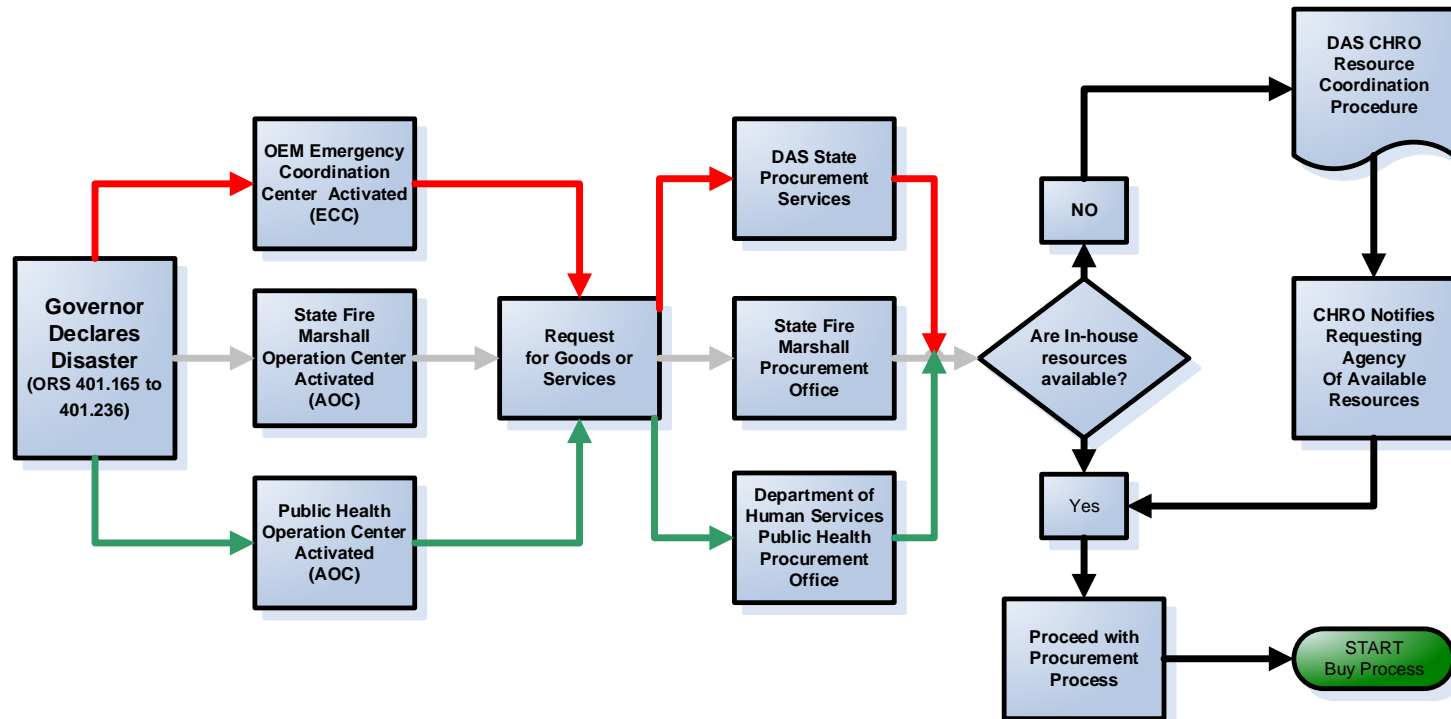Enterprise HR Services Contact Information: 503-378-3622

Resource Coordination Process Flow Chart

FORM DP500
Resource Coordination Process
Procurement Support for Disaster Response
Initial Response to Stabilization (not recovery procurement)

Disaster Resource Coordination Agreement Use Instructions

The disaster resource coordination process is used for identifying procurement staff in other agencies that in a major disaster, could back fill procurement office staff, if needed. If this is needed, the agreement below would be used for billing and other needed information to deploy staff. DAS Chief Human Resource Office (CHRO) can assist in locating additional staff, but payment would still be between receiving agency and the sending agency. In those cases the sending and receiving agency work through the IAA on their own, or they could accomplish this agreement through a job rotation agreement facilitated by CHRO or an entity's Human Resource office.

Disaster Resource Coordination Agreement Template

No: _____

<mark>DRAFT INTERAGENCY AGREEMENT</mark>

Disaster Coordination of Personnel and Supplies

THIS INTERAGENCY AGREEMENT is made and entered into by and among the authorized signatories of this Agreement, their successors and state agencies ("Parties" or "Agencies") under the authority granted in ORS 190.110, Article X-A of the Constitution of the State of Oregon, other laws, , _____, and collective bargaining agreements ("Agreement").

I.   PURPOSE

This Agreement establishes requirements and provides a procedure for coordinating the redeployment of Personnel and Supplies during a declared Disaster, as defined below, for the purpose of supporting activities among state Agencies and to determine which Agency is responsible for the costs of redeployment.

II.   EXCLUSIONS TO THE AGREEMENT

This Agreement does not apply to:

A.   Redeployment of Personnel and Supplies under a separate written agreement among the Parties that contains alternate terms and conditions.
B.   A formal demand by an Agency head to requisition Personnel and Supplies under ORS 283.110.
C.   Any redeployment of Personnel and Supplies that would be prohibited by federal or state law, and no exception or waiver exists.
D.   An Agency's use of private contractors or inmate labor.
E.   An Agency's rights to procure what it needs during a Disaster.
F.   Local governments.

III.   TERM OF AGREEMENT

This Agreement begins on the first date that at least two Agencies sign the Agreement and shall continue indefinitely, until terminated as set forth in this Agreement.

IV. DEFINITIONS

For the purposes of this Agreement, the following terms have the following meanings:

A. "CHRO" means the Department of Administrative Services (DAS), Chief Human Resources Office.
B. "Control Center" means a Disaster-related control center such as the State Emergency Coordination Center (ECC) or an Agency Operations Center (AOC) under ORS 431.264 or 433.441 to 433.452 as specifically described for public health.
C. "Chief Operating Officer" is appointed by the Governor and serves as the Director of DAS.
D. "Disaster" means a type of emergency that:
   a. Begins when the Governor or Governor's designee:
      i. Declares a state of emergency under ORS 401.165 to 401.236;
      ii. Issues a declaration under the Emergency Conflagration Act, ORS 476.510 to 476.610;
      iii. Declares a public health emergency under ORS 433.441 to 433.452;
      iv. Issues approval of one or more public health actions under ORS 431.264; or
      v. Declares a catastrophic disaster under Article X-A of the Constitution of the State of Oregon, and
   b. Ends when the Governor or Governor's designee terminates the state of Disaster or the state of Disaster expires according to statute.
E. "Personnel" means the employee(s) of one or more Agency providing services or supporting activities during a Disaster.
F. "Personnel and Supplies" includes "Personnel or Supplies," as appropriate.
G. "Receiving Agency" means the agency requesting Personnel or Supplies in the event of a Disaster.
H. "Redeploy" means to transfer Personnel or Supplies from one area or activity to another.
I. "Sending Agency" means the agency providing Personnel or Supplies in the event of a Disaster.
J. "Supplies" means goods, equipment, materials, and any other personal property, including any tangible, intangible and intellectual property, rights and related licenses, which an agency is authorized by law to redeploy during a Disaster.

V. OBLIGATIONS

A. COORDINATION OF REDEPLOYMENT OF PERSONNEL AND SUPPLIES
   a. Obligations between the Receiving Agency and Sending Agency are created when:
      i. The Receiving Agency requests Personnel or Supplies during a Disaster;
      ii. The Sending Agency voluntarily delivers or otherwise provides to the Receiving Agency the requested Personnel or Supplies; and
      iii. The Receiving Agency accepts the provided Personnel or Supplies from the Sending Agency.
   b. **Personnel.** CHRO will coordinate the statewide redeployment of Personnel, including oversight and any documentation, once a Receiving Agency requests additional Personnel.

c. **Supplies.** A Control Center will coordinate the statewide redeployment of Supplies, including oversight and any documentation, once a Receiving Agency requests additional Supplies.

d. **Coordination.** If the CHRO or Control Center is unable or unwilling to provide this coordination function, the Agencies may directly carry out the terms and conditions of this Agreement.

e. **Provisions of the Special Procurement.** The DAS Special Procurement no. 228-08 (as amended) provides a coordinated process for state agencies to quickly and fairly procure supplies and services during a Disaster. This Agreement and Special Procurement no. 228-08 are designed to work in tandem.

B. COSTS AND REIMBURSEMENT

a. The Sending Agency will bear the Personnel or Supplies costs for the Personnel and Supplies provided by the Sending Agency under this Agreement, unless the Agencies agree in writing to a different cost distribution.

b. Should the Disaster-related expenses be reimbursable by any state or federal agency, each Agency is responsible for filing its own request and documentation for reimbursement of costs.

C. TERMINATION OF THE REDEPLOYMENT

a. The Receiving Agency's use of any redeployed Personnel and Supplies will end when:

   i. The Receiving Agency determines the Personnel and Supplies are no longer needed;

   ii. The Sending Agency notifies the Receiving Agency that the Sending Agency is unable to continue providing the Personnel and Supplies;

   iii. The Governor or Governor's designee terminates the state of Disaster; or

   iv. The state of Disaster expires according to statute.

b. When Personnel are returned to the Sending Agency, it will return all assigned requests and associated documentation and communicate the status to the Receiving Agency's finance supervisor/coordinator or designee, the CHRO, and the Control Center, if applicable, and as soon as practicable.

c. The Receiving Agency will return to the Sending Agency tangible Supplies with a remaining useful life as soon as practicable.

VI. WITHDRAWAL OR TERMINATION OF THE AGREEMENT

Any Agency may withdraw from this Agreement upon thirty (30) calendar days written notice to the designee of the Chief Operating Officer.

The Chief Operating Officer or designee may terminate this Agreement upon thirty (30) calendar days written notice to the signatories.

VII.   AMENDMENTS

The terms of this Agreement shall not be waived, altered, modified, supplemented or amended, in any manner whatsoever, except by written amendment signed by all Parties. The amendment shall be effective as of the last date on which the Parties have signed the amendment.

VIII.   MERGER

This Agreement constitutes the entire agreement among the Parties on the subject matter hereof. There are no understandings, agreements, or representations, oral or written, not specified herein regarding this Agreement.

IX.   COUNTERPARTS, ELECTRONIC SIGNATURES, AND NOTICE

This Agreement may be executed in several counterparts, all of which when taken together shall constitute one Agreement, notwithstanding that all Parties are not signatories to the same counterpart. Each copy of this Agreement so executed shall constitute an original. Electronic signatures will be accepted as if they were original signatures. Upon signing this Agreement, the Agency shall give a copy of the executed agreement to the designee of the Chief Operating Officer. Parties, the CHRO, and the Control Center may obtain a list of Parties to the Agreement from the designee.

IN WITNESS WHEREOF the Parties hereto have caused this Agreement to be executed by their duly authorized officers as of the dates shown.

_____
Name of Agency

By:_____
      Name   Title

_____
Date

_____
Name of Agency

By:_____
      Name   Title

_____
Date

_____

Name of Agency

By:_____

     Name   Title

_____

Date

FEMA

(Federal Emergency Management Agency)

FEMA 90 Series Forms

These forms will need to be filled out in order to get reimbursement or emergency funds from a governing body. There are three forms with each one corresponding to a different procurement type.

- One is for supplies and materials ([FEMA FF 90-124](#))
- One is for force account labor ([FEMA FF 90-123](#))
- One is for rented equipment ([FEMA FF 90-125](#))

These are for reimbursement of funds used to respond to a disaster or to repair damages caused by a disaster.

NOTE: These are printed samples only. Please be sure to secure updated forms from [www.FEMA.gov](#).

FEMA Financial Records Guide

Agencies responding to disasters under appropriate authority may be able to recover some costs and expenses associated with their mobilized resources and response. Justification and documentation is required for agencies submitting claims and/or seeking reimbursement or emergency funds from a governing body or the emergency fund governed by the Legislature.

To standardize the required documentation, the use of FEMA forms is recommended.

To expedite reimbursement payment processes, procurement professionals should be aware of information concerning eligible costs and reimbursement processes requiring documentation and justification as it relates to the acquisition of goods and services. It is important to understand a cost to be "reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost." (OMB Circular A-87)

Services, equipment and supplies that are purchased specifically in order to perform the mission must be governed by formally adopted procurement rules, regulations and code.

In general, those items of equipment and supplies that cost under $5,000 are eligible to be claimed upon accurate documentation. Items of equipment worth more than $5,000 and residual unused supplies in excess of $5,000 after the disaster work is completed will require adjustment of the eligible acquisition cost.

Contracted services that are necessary to perform emergency work may be eligible upon appropriate justification and documentation.

Mission-Related Costs Must Be:
1. Actual costs
2. Compliant with federal, state, and local procurement requirements
3. Calculated using current unit cost structures or other commonly accepted methods, such as:
    a. Historic documentation for similar work
    b. Average costs for similar work in the area
    c. Published unit costs from national cost estimating databases
    d. FEMA cost codes
    e. FEMA equipment rates

Ineligible Costs:
1. Administrative costs associated with pre-deployment and post-deployment functions.
2. Replacement costs of items replaced prior to deployment
3. Costs for alcohol, tobacco, toiletries, etc.
4. Costs incurred by an entity that self-deployed without an approved mission.

Documentation Requirements:
1. Itemized invoices and/or receipts for all items including, but not limited to, clear descriptions of items purchased (e.g., serial numbers, or other identifying information), costs, dates, vendors, and invoice/receipt numbers.
2. Documentation indicating that either state or federal procurement regulations, whichever are applicable, were followed or a legally acceptable explanation as to why applicable state or federal procurement regulations were not followed, including, but not limited to, copies of request for proposals (RFPs), summaries or responses to RFPs, price quotes and bid tabulations, and copies of government credit card statements, and completed purchase orders.
3. Accurately completed Rental Equipment Summary Records.
4. Copies of all agreements or contracts.
5. Clear descriptions of work performed and dates of work performed for contracted work.

Forms:
1. Materials Summary Records ([FEMA Form 90-124](#))
2. Force Account Labor Summary Record ([FEMA Form 90-123](#))
3. Rented Equipment Summary Record ([FEMA Form 90-125](#))

DEPARTMENT OF HOMELAND SECURITY FEDERAL EMERGENCY MANAGEMENT AGENCY **MATERIALS SUMMARY RECORD**	PAGE_____ OF_____	*O.M.B. No.1660-0017* *Expires December 31,2011*

APPLICANT	PAID NO.	PROJECT NO.	DISASTER
LOCATION/SITE		CATEGORY	PERIOD COVERING

DESCRIPTION OF WORK PERFORMED

VENDOR	DESCRIPTION	QUAN.	UNIT PRICE	TOTAL PRICE	DATE PURCHASED	DATE USED	INFO FROM (CHECK ONE)	
							INVOICE	STOCK
GRAND TOTAL								

I CERTIFYTHAT THE INFORMATION WAS OBTAINED FROM PAYROLL RECORDS, INVOICES, OR OTHER DOCUMENTS THAT ARE AVAILABLE FOR AUDIT.

CERTIFIED	TITLE	DATE

FEMA Form 90-124, FEB 03

DEPARTMENT OF HOMELAND SECURITY FEDERAL EMERGENCY MANAGEMENT AGENCY **FORCE ACCOUNT LABOR SUMMARY RECORD**	PAGE ___ OF ___	*O.M.B. No. 1660-0017* *Expires Dec.ember 31, 2011*

APPLICANT		PAID NO.	PROJECT NO.	DISASTER
LOCATION/SITE			CATEGORY	PERIOD COVERING

DESCRIPTION OF WORK PERFORMED

NAME	DATES AND HOURS WORKED EACH WEEK								COSTS				
JOB TITLE	DATE								TOTAL HOURS	HOURLY RATE	BENEFIT RATE/HR	TOTAL HOURLY RATE	TOTAL COSTS
NAME	REG.												
JOB TITLE	O.T.												
NAME	REG.												
JOB TITLE	O.T.												
NAME	REG.												
JOB TITLE	O.T.												
NAME	REG.												
JOB TITLE	O.T.												

TOTAL COSTS FOR FORCE ACCOUNT LABOR REGULARTIME	$
TOTAL COST FOR FORCE ACCOUNT LABOR OVERTIME	$

I CERTIFY THAT THE INFORMATION ABOVE WAS OBTAINED FROM PAYROLL RECORDS, INVOICES, OR OTHER DOCUMENTS THAT ARE AVAILABLE FOR AUDIT.

CERTIFIED	TITLE	DATE

FEMA Form 90-123. FEB 09

DEPARTMENT OF HOMELAND SECURITY FEDERAL EMERGENCY MANAGEMENT AGENCY **RENTED EQUIPMENT SUMMARY RECORD**	PAGE ___ OF ___	*O.M.B. No.1660-0017* *Expires December 31, 2011*

APPLICANT	PAID NO.	PROJECT NO.	DISASTER

LOCATION/SITE	CATEGORY	PERIOD COVERING

DESCRIPTION OF WORK PERFORMED

TYPE OF EQUIPMENT Indicate size, Capacity, Horsepower Make and Model as Appropriate	DATES AND HOURS USED	RATE PER HOUR		TOTAL COST	VENDOR	INVOICE NO.	DATE AND AMOUNT PAID	CHECK NO.
		W/OPR	W/OUT OPR					

GRANDTOTAL ━━━━━━━━━━━━━━━━

I CERTIFY THAT THE ABOVE INFORMATION WAS OBTAINED FROM PAYROLL RECORDS, INVOICES OR OTHER DOCUMENTS THAT ARE AVAILABL FOR AUDIT.

CERTIFIED	TITLE	DATE

FEMA Form 90-125, FEB 09

Mobile Office/Staff Go Bag

The mobile office is designed to be transported into the field so procurement activities can be done on site. This section includes a list of suggested items for a mobile office.

Mobile Office/Staff GO Bag Guideline

Overview

The DAS State Procurement Services has created 8 mobile offices that are strategically placed with managers and other key personnel from DAS SPS that will be used in the event of a disaster. The purpose of the mobile office is to provide DAS SPS staff with the ability to perform critical job responsibilities from at their homes or vehicles. The mobile offices are equipped with hard copy information and documents, technology and supplies that allow the DAS SPS staff to communicate with each other and process emergency procurements related to disasters.

Technology and Supplies

- Each staff uses their own state issued lap top.
- 2 way radio and user guide (FRS type that uses AAA batteries)
- State issued cell phone for pictures and calls
- First Aid Kit
- USB Flash Drive
- Emergency AM/FM Radio w/ Hand Crank
- AA-Cell LED Flash Light
- Metal Clipboard with Cover
- Oregon Road Map
- Mini versions of yellow pages for Portland, Salem, Eugene, Medford and Bend
- Copies of current blank State of Oregon Purchase Orders
- Copy of emergency contact and key personnel info
- Miscellaneous Office supplies (pads, pencils, pens, stapler, paper clips)
- Extra AA and AAA Batteries
- Non-perishable snacks
- 1 roll of duct tape
- Construction grade nitrile glove
- Surgical masks (N-95 recommended grade)
- Hand sanitizer
- Emergency water packet
- Energy bar

Staffing Assignments

8 mobile offices are assigned as follows:

- 1 mobile office assigned to each team lead from the transaction unit of DAS SPS
- 1 mobile office for each of the three managers of DAS SPS

- 1 mobile office assigned to a member of eProcurement support.
- 1 mobile office assigned on a rotation basis with the two ESF 7 Liaisons.

The ESF 7 Liaisons and State eProcurement support will review and refresh if needed on an annual basis the O Drive and also on the flash drives contained in the mobile offices.

If the disaster is sustained over a long period of time, the mobile offices will be transferred to other DAS SPS staff and a rotation will be set up to provide rest periods.

Information and Technology Refresh

The information contained in the mobile offices will be reviewed and if needed refreshed annually. The ESF 7 Liaisons will refresh the flash drives contained in the mobile offices. The current assigned ESF 7 Liaisons from the rotation schedule shall be responsible for the coordination of the refresh and will ensure all mobile offices have been updated prior to rotation of the next ESF 7 Liaisons. The information will include the latest emergency contact list, emergency contracts list downloaded from state data base, the most current state equipment list (this equipment list is maintained by DAS Fleet Services), state owned facilities (primarily agencies that have large storage or staging areas such as ODOT, Dept of Corrections and Parks and Recreation), emergency and disaster related items available at DAS Surplus, and financial (Emergency SPOTS Card Holders) resources, event logs, finance logs and blank PO forms and any other information needed in the event of an emergency. The same information will also be kept on the O Drive/ASP /Z-Disaster Emergency ESF-7 Liaison folder and the ESF 7 Liaisons will update the flash drives from here. The information on the O Drive shall be updated by SPS staff on an as needed basis. Batteries and snacks will also be refreshed. The ESF 7 Liaisons will coordinate the return, refresh and redistribution of the mobile offices back to staff.

Storing and Activating Mobile Offices

Mobile offices will be kept at a safe location at the assigned staff homes. The information contained in these mobile offices has a low security risk (Level 2) and isn't confidential; however employees should use proper care to ensure the physical security of the mobile office and its contents to prevent potential compromise through loss or theft of the mobile office. The mobile offices will be brought into action when called upon during a disaster. The staff will be responsible for bringing the mobile offices into DAS SPS on an annual basis for information refresh. The ESF 7 Liaisons will coordinate this activity. The Mobile offices will be tracked by DAS State Procurement Services.

Appendices

Special Procurement

This special procurement rules in conjunction with the below SP gives authority to conduct procurements within a disaster.

Visit the [DAS Helpful Resources webpage](#) for a link to the Disaster Response Special Procurement Document.

Purchase Order Terms and Conditions for Goods

Link to [Purchase Order for Goods](#) template with terms and conditions.

Emergency Contact Numbers

OregonBuys Help Desk
epro-support@periscopeholdings.com or 1-888-472-9102
Nicole Brazeal   Work: 503-302-9542

**SPOTS Cards, Statewide Financial Management Systems
(SFMS)**   503-373-1044

State Procurement Services   503-378-4642
CPO: Stephen Nelson   Work: 971-719-1680
Deputy CPO: Darwin Kumpula   Work: 971-900-7436

Managers
John Angelmier   Work: 971-349-2346
Brent Lutz   Work: 971-719-3436
Norma Armstrong   Work: 971-209-9964

DAS ESF 7 Managers
Brad Cunningham   Work: 971-707-2751
Brian King   Work: 503-428-2222

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ICS	Review Material

Incident Command System (ICS)

ICS was developed in the 1970s following a series of catastrophic fires in California's urban interface. Property damage ran into the millions, and many people died or were injured. The personnel assigned to determine the causes of these outcomes studied the case histories and discovered that response problems could rarely be attributed to lack of resources or failure of tactics. Surprisingly, studies found that response problems were far more likely to result from inadequate management than from any other single reason.

The Incident Command System:

- Is a standardized management tool for meeting the demands of small or large emergency or nonemergency situations.

- Represents "best practices" and has become the standard for emergency management across the country.

- May be used for planned events, natural disasters, and acts of terrorism.

- Is a key feature of the National Incident Management System (NIMS).

The ICS is a management system designed to enable effective and efficient domestic incident management by integrating a combination of facilities, equipment, personnel, procedures, and communications operating within a common organizational structure, designed to enable effective and efficient domestic incident management. A basic premise of ICS is that it is widely applicable. It is used to organize both near-term and long-term field-level operations for a broad spectrum of emergencies, from small to complex incidents, both natural and manmade. ICS is used by all levels of government—Federal, State, local, and tribal—as well as by many private-sector and nongovernmental organizations. ICS is also applicable across disciplines. It is normally structured to facilitate activities in five major functional areas: command, operations, planning, logistics, and finance and administration.

Incident Complexity

"Incident complexity" is the combination of involved factors that affect the probability of control of an incident. Many factors determine the complexity of an incident, including, but not limited to, area involved, threat to life and property, political sensitivity, organizational complexity, jurisdictional boundaries, values at risk, weather, strategy and tactics, and agency policy.

Incident complexity is considered when making incident management level, staffing, and safety decisions.

Various analysis tools have been developed to assist consideration of important factors involved in incident complexity. Listed below are the factors that may be considered in analyzing incident complexity:

- Impacts to life, property, and the economy
- Community and responder safety
- Potential hazardous materials
- Weather and other environmental influences
- Likelihood of cascading events
- Potential crime scene (including terrorism)
- Political sensitivity, external influences, and media relations
- Area involved, jurisdictional boundaries
- Availability of resources

ICS Review Materials: ICS History and Features

ICS Features

The 14 essential ICS features are listed below:

Standardization:

- **Common Terminology:** Using common terminology helps to define organizational functions, incident facilities, resource descriptions, and position titles.

Command:

- **Establishment and Transfer of Command:** The command function must be clearly established from the beginning of an incident. When command is transferred, the process must include a briefing that captures all essential information for continuing safe and effective operations.

- **Chain of Command and Unity of Command:** Chain of command refers to the orderly line of authority within the ranks of the incident management organization. Unity of command means that every individual has a designated supervisor to whom he or she reports at the scene of the incident. These principles clarify reporting relationships and eliminate the confusion caused by multiple, conflicting directives. Incident managers at all levels must be able to control the actions of all personnel under their supervision.

- **Unified Command:** In incidents involving multiple jurisdictions, a single jurisdiction with multiagency involvement, or multiple jurisdictions with multiagency involvement, Unified Command allows agencies with different legal, geographic, and functional authorities and responsibilities to work together effectively without affecting individual agency authority, responsibility, or accountability.

Planning/Organizational Structure:

- **Management by Objectives:** Includes establishing overarching objectives; developing strategies based on incident objectives; developing and issuing assignments, plans, procedures, and protocols; establishing specific, measurable objectives for various incident management functional activities and directing efforts to attain them, in support of defined strategies; and documenting results to measure performance and facilitate corrective action.

- **Modular Organization:** The Incident Command organizational structure develops in a modular fashion that is based on the size and complexity of the incident, as well as the specifics of the hazard environment created by the incident.

- **Incident Action Planning:** Incident Action Plans (IAPs) provide a coherent means of communicating the overall incident objectives in the context of both operational and support activities.

- **Manageable Span of Control:** Span of control is key to effective and efficient incident management. Within ICS, the span of control of any individual with incident management supervisory responsibility should range from three to seven subordinates.

ICS Review Materials: ICS History and Features

ICS Features (Continued)

Facilities and Resources:

- **Incident Locations and Facilities:** Various types of operational support facilities are established in the vicinity of an incident to accomplish a variety of purposes. Typical designated facilities include Incident Command Posts, Bases, Camps, Staging Areas, Mass Casualty Triage Areas, and others as required.

- **Comprehensive Resource Management:** Maintaining an accurate and up-to-date picture of resource utilization is a critical component of incident management. Resources are defined as personnel, teams, equipment, supplies, and facilities available or potentially available for assignment or allocation in support of incident management and emergency response activities.

Communications/Information Management

- **Integrated Communications:** Incident communications are facilitated through the development and use of a common communications plan and interoperable communications processes and architectures.

- **Information and Intelligence Management:** The incident management organization must establish a process for gathering, analyzing, sharing, and managing incident-related information and intelligence.

Professionalism:

- **Accountability:** Effective accountability at all jurisdictional levels and within individual functional areas during incident operations is essential. To that end, the following principles must be adhered to:

  - **Check-In:** All responders, regardless of agency affiliation, must report in to receive an assignment in accordance with the procedures established by the Incident Commander.
  - **Incident Action Plan:** Response operations must be directed and coordinated as outlined in the IAP.
  - **Unity of Command:** Each individual involved in incident operations will be assigned to only one supervisor.
  - **Personal Responsibility:** All responders are expected to use good judgment and be accountable for their actions.
  - **Span of Control:** Supervisors must be able to adequately supervise and control their subordinates, as well as communicate with and manage all resources under their supervision.
  - **Resource Tracking:** Supervisors must record and report resource status changes as they occur.

- **Dispatch/Deployment:** Personnel and equipment should respond only when requested or when dispatched by an appropriate authority.

Transfer of Command

The process of moving the responsibility for incident command from one Incident Commander to another is called "transfer of command." It should be recognized that transition of command on an expanding incident is to be expected. It does not reflect on the competency of the current Incident Commander.

There are five important steps in effectively assuming command of an incident in progress.

Step 1: The incoming Incident Commander should, if at all possible, personally perform an assessment of the incident situation with the existing Incident Commander.

Step 2: The incoming Incident Commander must be adequately briefed.

This briefing must be by the current Incident Commander, and take place face-to-face if possible. The briefing must cover the following:

- Incident history (what has happened)
- Priorities and objectives
- Current plan
- Resource assignments
- Incident organization
- Resources ordered/needed
- Facilities established
- Status of communications
- Any constraints or limitations
- Incident potential
- Delegation of Authority

The ICS Form 201 is especially designed to assist in incident briefings. It should be used whenever possible because it provides a written record of the incident as of the time prepared. The ICS Form 201 contains:

- Incident objectives.
- A place for a sketch map.
- Summary of current actions.
- Organizational framework.
- Resources summary.

Step 3: After the incident briefing, the incoming Incident Commander should determine an appropriate time for transfer of command.

Step 4: At the appropriate time, notice of a change in incident command should be made to:

- Agency headquarters (through dispatch).
- General Staff members (if designated).
- Command Staff members (if designated).
- All incident personnel.

Step 5: The incoming Incident Commander may give the previous Incident Commander another assignment on the incident. There are several advantages of this:

- The initial Incident Commander retains first-hand knowledge at the incident site.
- This strategy allows the initial Incident Commander to observe the progress of the incident and to gain experience.

Modular Organization

Standardization of the ICS organizational chart and associated terms does not limit the flexibility of the system. (See the chart on the next page.)

A key principle of ICS is its flexibility. The ICS organization may be expanded easily from a very small size for routine operations to a larger organization capable of handling catastrophic events.

Flexibility does not mean that the ICS feature of common terminology is superseded. Note that flexibility is allowed within the standard ICS organizational structure and position titles.

Position Titles

At each level within the ICS organization, individuals with primary responsibility positions have distinct titles. Titles provide a common standard for all users. For example, if one agency uses the title Branch Chief, another Branch Manager, etc., this lack of consistency can cause confusion at the incident.

The use of distinct titles for ICS positions allows for filling ICS positions with the most qualified individuals rather than by seniority. Standardized position titles are useful when requesting qualified personnel. For example, in deploying personnel, it is important to know if the positions needed are Unit Leaders, clerks, etc.

Listed below are the standard ICS titles:

Organizational Level	Title	Support Position
Incident Command	Incident Commander	Deputy
Command Staff	Officer	Assistant
General Staff (Section)	Chief	Deputy
Branch	Director	Deputy
Division/Group	Supervisor	N/A
Unit	Leader	Manager
Strike Team/Task Force	Leader	Single Resource Boss

ICS Organization
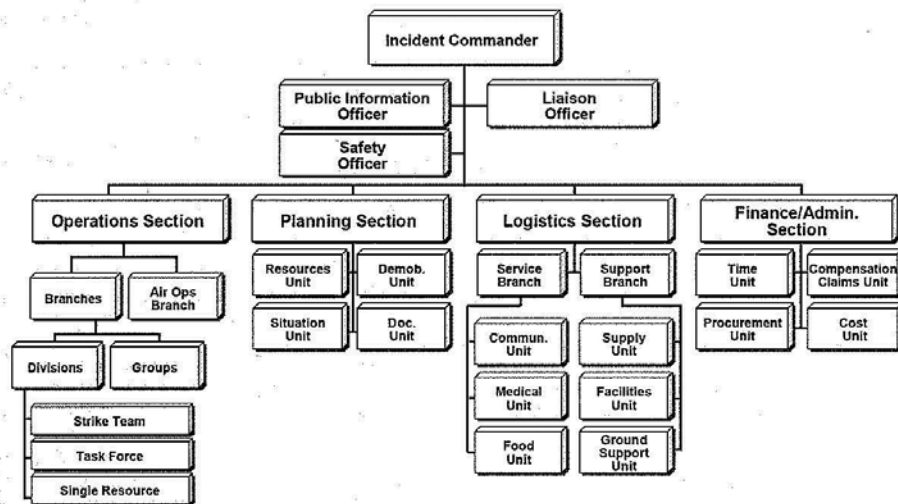
- **Command Staff:** The Command Staff consists of the Public Information Officer, Safety Officer, and Liaison Officer. They report directly to the Incident Commander.

- **Section:** The organization level having functional responsibility for primary segments of incident management (Operations, Planning, Logistics, Finance/Administration). The Section level is organizationally between Branch and Incident Commander.

- **Branch:** That organizational level having functional, geographical, or jurisdictional responsibility for major parts of the incident operations. The Branch level is organizationally between Section and Division/Group in the Operations Section, and between Section and Units in the Logistics Section. Branches are identified by the use of Roman Numerals, by function, or by jurisdictional name.

- **Division:** That organizational level having responsibility for operations within a defined geographic area. The Division level is organizationally between the Strike Team and the Branch.

- **Group:** Groups are established to divide the incident into functional areas of operation. Groups are located between Branches (when activated) and Resources in the Operations Section.

- **Unit:** That organization element having functional responsibility for a specific incident planning, logistics, or finance/administration activity.

- **Task Force:** A group of resources with common communications and a leader that may be pre-established and sent to an incident, or formed at an incident.

- **Strike Team:** Specified combinations of the same kind and type of resources, with common communications and a leader.

- **Single Resource:** An individual piece of equipment and its personnel complement, or an established crew or team of individuals with an identified work supervisor that can be used on an incident.

Overall Organizational Functions

ICS was designed by identifying the primary activities or functions necessary to effectively respond to incidents. Analyses of incident reports and review of military organizations were all used in ICS development. These analyses identified the primary needs of incidents.

As incidents became more complex, difficult, and expensive, the need for an organizational manager became more evident. Thus in ICS, and especially in larger incidents, the Incident Commander manages the organization and not the incident.

In addition to the Command function, other desired functions and activities were:

- To delegate authority and to provide a separate organizational level within the ICS structure with sole responsibility for the tactical direction and control of resources.
- To provide logistical support to the incident organization.
- To provide planning services for both current and future activities.
- To provide cost assessment, time recording, and procurement control necessary to support the incident and the managing of claims.
- To promptly and effectively interact with the media, and provide informational services for the incident, involved agencies, and the public.
- To provide a safe operating environment within all parts of the incident organization.
- To ensure that assisting and cooperating agencies' needs are met, and to see that they are used in an effective manner.

Incident Commander

The Incident Commander is technically not a part of either the General or Command Staff. The Incident Commander is responsible for overall incident management, including:

- Ensuring clear authority and knowledge of agency policy.
- Ensuring incident safety.
- Establishing an Incident Command Post.
- Obtaining a briefing from the prior Incident Commander and/or assessing the situation.
- Establishing immediate priorities.
- Determining incident objectives and strategy(ies) to be followed.
- Establishing the level of organization needed, and continuously monitoring the operation and effectiveness of that organization.
- Managing planning meetings as required.
- Approving and implementing the Incident Action Plan.
- Coordinating the activities of the Command and General Staff.
- Approving requests for additional resources or for the release of resources.
- Approving the use of participants, volunteers, and auxiliary personnel.
- Authorizing the release of information to the news media.
- Ordering demobilization of the incident when appropriate.
- Ensuring incident after-action reports are complete.
- Authorizing information release to the media.

Command Staff

The Command Staff is assigned to carry out staff functions needed to support the Incident Commander. These functions include interagency liaison, incident safety, and public information.

Command Staff positions are established to assign responsibility for key activities not specifically identified in the General Staff functional elements. These positions may include the Public Information Officer, Safety Officer, and Liaison Officer, in addition to various others, as required and assigned by the Incident Commander.

The table on the following page summarizes the responsibilities of the Command Staff.

General Staff

The General Staff represents and is responsible for the functional aspects of the incident command structure. The General Staff typically consists of the Operations, Planning, Logistics, and Finance/Administration Sections.

General guidelines related to General Staff positions include the following:

- Only one person will be designated to lead each General Staff position.
- General Staff positions may be filled by qualified persons from any agency or jurisdiction.
- Members of the General Staff report directly to the Incident Commander. If a General Staff position is not activated, the Incident Commander will have responsibility for that functional activity.
- Deputy positions may be established for each of the General Staff positions. Deputies are individuals fully qualified to fill the primary position. Deputies can be designated from other jurisdictions or agencies, as appropriate. This is a good way to bring about greater interagency coordination.
- General Staff members may exchange information with any person within the organization. Direction takes place through the chain of command. This is an important concept in ICS.
- General Staff positions should not be combined. For example, to establish a "Planning and Logistics Section," it is better to initially create the two separate functions, and if necessary for a short time place one person in charge of both. That way, the transfer of responsibility can be made easier.

The following table summarizes the responsibilities of the Command and General Staff.

Command Staff	Responsibilities
Public Information Officer	• Determine, according to direction from the IC, any limits on information release. • Develop accurate, accessible, and timely information for use in press/media briefings. • Obtain IC's approval of news releases. • Conduct periodic media briefings. • Arrange for tours and other interviews or briefings that may be required. • Monitor and forward media information that may be useful to incident planning. • Maintain current information, summaries, and/or displays on the incident. • Make information about the incident available to incident personnel. • Participate in the planning meeting.
Safety Officer	• Identify and mitigate hazardous situations. • Ensure safety messages and briefings are made. • Exercise emergency authority to stop and prevent unsafe acts. • Review the Incident Action Plan for safety implications. • Assign assistants qualified to evaluate special hazards. • Initiate preliminary investigation of accidents within the incident area. • Review and approve the Medical Plan. • Participate in planning meetings.
Liaison Officer	• Act as a point of contact for agency representatives. • Maintain a list of assisting and cooperating agencies and agency representatives. • Assist in setting up and coordinating interagency contacts. • Monitor incident operations to identify current or potential interorganizational problems. • Participate in planning meetings, providing current resource status, including limitations and capabilities of agency resources. • Provide agency-specific demobilization information and requirements.
Assistants	In the context of large or complex incidents, Command Staff members may need one or more assistants to help manage their workloads. Each Command Staff member is responsible for organizing his or her assistants for maximum efficiency.
Additional Command Staff	Additional Command Staff positions may also be necessary depending on the nature and location(s) of the incident, and/or specific requirements established by the Incident Commander. For example, a Legal Counsel may be assigned directly to the Command Staff to advise the Incident Commander on legal matters, such as emergency proclamations, legality of evacuation orders, and legal rights and restrictions pertaining to media access. Similarly, a Medical Advisor may be designated and assigned directly to the Command Staff to provide advice and recommendations to the Incident Commander in the context of incidents involving medical and mental health services, mass casualty, acute care, vector control, epidemiology, and/or mass prophylaxis considerations, particularly in the response to a bioterrorism event.

Source: NIMS

General Staff	Responsibilities
Operations Section Chief	The Operations Section Chief is responsible for managing all tactical operations at an incident. The Incident Action Plan (IAP) provides the necessary guidance. The need to expand the Operations Section is generally dictated by the number of tactical resources involved and is influenced by span of control considerations. Major responsibilities of the Operations Section Chief are to: ■ Assure safety of tactical operations. ■ Manage tactical operations. ■ Develop the operations portion of the IAP. ■ Supervise execution of operations portions of the IAP. ■ Request additional resources to support tactical operations. ■ Approve release of resources from active operational assignments. ■ Make or approve expedient changes to the IAP. ■ Maintain close contact with IC, subordinate Operations personnel, and other agencies involved in the incident.
Planning Section Chief	The Planning Section Chief is responsible for providing planning services for the incident. Under the direction of the Planning Section Chief, the Planning Section collects situation and resources status information, evaluates it, and processes the information for use in developing action plans. Dissemination of information can be in the form of the IAP, in formal briefings, or through map and status board displays. Major responsibilities of the Planning Section Chief are to: ■ Collect and manage all incident-relevant operational data. ■ Supervise preparation of the IAP. ■ Provide input to the IC and Operations in preparing the IAP. ■ Incorporate Traffic, Medical, and Communications Plans and other supporting materials into the IAP. ■ Conduct and facilitate planning meetings. ■ Reassign personnel within the ICS organization. ■ Compile and display incident status information. ■ Establish information requirements and reporting schedules for units (e.g., Resources, Situation Units). ■ Determine need for specialized resources. ■ Assemble and disassemble Task Forces and Strike Teams not assigned to Operations. ■ Establish specialized data collection systems as necessary (e.g., weather). ■ Assemble information on alternative strategies. ■ Provide periodic predictions on incident potential. ■ Report significant changes in incident status. ■ Oversee preparation of the Demobilization Plan.

General Staff	Responsibilities
Logistics Section Chief	The Logistics Section Chief provides all incident support needs with the exception of logistics support to air operations. The Logistics Section is responsible for providing: ▪ Facilities. ▪ Transportation. ▪ Communications. ▪ Supplies. ▪ Equipment maintenance and fueling. ▪ Food services (for responders). ▪ Medical services (for responders). ▪ All off-incident resources. Major responsibilities of the Logistics Section Chief are to: ▪ Provide all facilities, transportation, communications, supplies, equipment maintenance and fueling, food and medical services for incident personnel, and all off-incident resources. ▪ Manage all incident logistics. ▪ Provide logistical input to the IAP. ▪ Brief Logistics Staff as needed. ▪ Identify anticipated and known incident service and support requirements. ▪ Request additional resources as needed. ▪ Ensure and oversee the development of the Communications, Medical, and Traffic Plans as required. ▪ Oversee demobilization of the Logistics Section and associated resources.
Finance/ Administration Section Chief	The Finance/Administration Section Chief is responsible for managing all financial aspects of an incident. Not all incidents will require a Finance/Administration Section. Only when the involved agencies have a specific need for finance services will the Section be activated. Major responsibilities of the Finance/Administration Section Chief are to: ▪ Manage all financial aspects of an incident. ▪ Provide financial and cost analysis information as requested. ▪ Ensure compensation and claims functions are being addressed relative to the incident. ▪ Gather pertinent information from briefings with responsible agencies. ▪ Develop an operating plan for the Finance/Administration Section and fill Section supply and support needs. ▪ Determine the need to set up and operate an incident commissary. ▪ Meet with assisting and cooperating agency representatives as needed. ▪ Maintain daily contact with agency(s) headquarters on finance matters. ▪ Ensure that personnel time records are completed accurately and transmitted to home agencies. ▪ Ensure that all obligation documents initiated at the incident are properly prepared and completed. ▪ Brief agency administrative personnel on all incident-related financial issues needing attention or followup. ▪ Provide input to the IAP.

Agency Representatives

An Agency Representative is an individual assigned to an incident from an assisting or cooperating agency. The Agency Representative must be given authority to make decisions on matters affecting that agency's participation at the incident.

Agency Representatives report to the Liaison Officer or to the Incident Commander in the absence of a Liaison Officer.

Major responsibilities of the Agency Representative are to:

- Ensure that all of their agency resources have completed check-in at the incident.
- Obtain briefing from the Liaison Officer or Incident Commander.
- Inform their agency personnel on the incident that the Agency Representative position has been filled.
- Attend planning meetings as required.
- Provide input to the planning process on the use of agency resources unless resource technical specialists are assigned from the agency.
- Cooperate fully with the Incident Commander and the Command and General Staff on the agency's involvement at the incident.
- Oversee the well-being and safety of agency personnel assigned to the incident.
- Advise the Liaison Officer of any special agency needs, requirements, or agency restrictions.
- Report to agency dispatch or headquarters on a prearranged schedule.
- Ensure that all agency personnel and equipment are properly accounted for and released prior to departure.
- Ensure that all required agency forms, reports, and documents are complete prior to departure.
- Have a debriefing session with the Liaison Officer or Incident Commander prior to departure.

Technical Specialists

Certain incidents or events may require the use of Technical Specialists who have specialized knowledge and expertise. Technical Specialists may function within the Planning Section, or be assigned wherever their services are required.

While each incident dictates the need for Technical Specialists, some examples of the more commonly used specialists are:

- Meteorologists.
- Environmental Impact Specialists.
- Flood Control Specialists.
- Water Use Specialists.
- Fuels and Flammable Specialists.
- Hazardous Substance Specialists.
- Fire Behavior Specialists.
- Structural Engineers.
- Training Specialists.

(Continued on next page.)

Additional advisory positions may also be necessary depending on the nature and location(s) of the incident, and/or specific requirements established by the Incident Commander. For example, a Legal Counsel may be assigned directly to the Command Staff to advise the Incident Commander on legal matters, such as emergency proclamations, legality of evacuation orders, and legal rights and restrictions pertaining to media access. Similarly, a Medical Advisor may be designated and assigned directly to the Command Staff to provide advice and recommendations to the Incident Commander in the context of incidents involving medical and mental health services, mass casualty, acute care, vector control, epidemiology, and/or mass prophylaxis considerations, particularly in the response to a bioterrorism event. These positions may also be considered Technical Specialists.

Intelligence/Investigations Function

- **The collection, analysis, and sharing of incident-related intelligence are important elements of ICS.**

    - Typically, operational information and situational intelligence are management functions located in the Planning Section, with a focus on three incident intelligence areas: situation status, resource status, and anticipated incident status or escalation (e.g., weather forecasts, location of supplies, etc.).
    - This information and intelligence is utilized for incident management decisionmaking. In addition, Technical Specialists may be utilized in the Planning Section to provide specific information that may support tactical decisions on an incident.

- **Incident management organizations must also establish a system for the collection, analysis, and sharing, as possible, of information developed during intelligence/investigations efforts.**

    - Some incidents require the utilization of intelligence and investigative information to support the process. Intelligence and investigative information is defined as information that either leads to the detection, prevention, apprehension, and prosecution of criminal activities (or the individuals(s) involved), including terrorist incidents, or information that leads to determination of the cause of a given incident (regardless of the source) such as public health events or fires with unknown origins.

Topic	Organizational Structure

- ICS allows for organizational flexibility, so the Intelligence/Investigations Function can be embedded in several different places within the organizational structure:

  - **Within the Planning Section.** This is the traditional placement for this function and is appropriate for incidents with little or no investigative information requirements, nor a significant amount of specialized information.
  - **As a Separate General Staff Section.** This option may be appropriate when there is an intelligence/investigative component to the incident or when multiple investigative agencies are part of the investigative process and/or there is a need for classified intelligence.
  - **Within the Operations Section.** This option may be appropriate for incidents that require a high degree of linkage and coordination between the investigative information and the operational tactics that are being employed.
  - **Within the Command Staff.** This option may be appropriate for incidents with little need for tactical information or classified intelligence and where supporting Agency Representatives are providing the real-time information to the Command Element.

- **The mission of the Intelligence/Investigations Function is to ensure that all investigative and intelligence operations, functions, and activities within the incident response are properly managed, coordinated, and directed in order to:**

  - Prevent/deter additional activity, incidents, and/or attacks.
  - Collect, process, analyze, and appropriately disseminate intelligence information.
  - Conduct a thorough and comprehensive investigation.
  - Identify, process, collect, create a chain of custody for, safeguard, examine/analyze, and store all situational intelligence and/or probative evidence.

- **The Intelligence/Investigations Function has responsibilities that cross all departments' interests involved during an incident, but there are functions that remain specific to law enforcement response and/or mission areas.** Two examples of these are expeditious identification and apprehension of all perpetrators, and successful prosecution of all defendants.

  Regardless of how the Intelligence/Investigations Function is organized, a close liaison will be maintained and information will be transmitted to Command, Operations, and Planning. However, classified information requiring a security clearance, sensitive information, or specific investigative tactics that would compromise the investigation will be shared only with those who have the appropriate security clearance and need to know.

Unified Command

The Unified Command organization consists of the Incident Commanders from the various jurisdictions or agencies operating together to form a single command structure.

Overview

Unified Command is an important element in multijurisdictional or multiagency domestic incident management. It provides guidelines to enable agencies with different legal, geographic, and functional responsibilities to coordinate, plan, and interact effectively.

As a team effort, Unified Command overcomes much of the inefficiency and duplication of effort that can occur when agencies from different functional and geographic jurisdictions, or agencies at different levels of government, operate without a common system or organizational framework.

All agencies with jurisdictional authority or functional responsibility for any or all aspects of an incident participate in the Unified Command structure and contribute to the following process and responsibilities:

- Determining overall incident strategies.
- Selecting objectives.
- Ensuring that joint planning for tactical activities is accomplished in accordance with approved incident objectives.
- Ensuring the integration of tactical operations.
- Approving, committing, and making optimal use of all assigned resources.

The exact composition of the Unified Command structure will depend on the location(s) of the incident (i.e., which geographical administrative jurisdictions are involved) and the type of incident (i.e., which functional agencies of the involved jurisdiction(s) are required). In the case of some multijurisdictional incidents, the designation of a single Incident Commander may be considered to promote greater unity of effort and efficiency.

Source: NIMS

Unified Command

Authority

Authority and responsibility for an Incident Commander to manage an incident or event comes in the form of a delegation of authority from the agency executive or administrator of the jurisdiction of occurrence or inherent in existing agency policies and procedures. When an incident/event spans multiple jurisdictions this responsibility belongs to the various jurisdictional and agency executives or administrators who set policy and are accountable to their jurisdictions or agencies. They must appropriately delegate to the Unified Commanders the authority to manage the incident. Given this authority, the Unified Commanders will then collectively develop one comprehensive set of incident objectives, and use them to develop strategies.

Advantages of Using Unified Command

The advantages of using Unified Command include:

- A single set of objectives is developed for the entire incident.
- A collective approach is used to develop strategies to achieve incident objectives.
- Information flow and coordination is improved between all jurisdictions and agencies involved in the incident.
- All agencies with responsibility for the incident have an understanding of joint priorities and restrictions.
- No agency's legal authorities will be compromised or neglected.
- The combined efforts of all agencies are optimized as they perform their respective assignments under a single Incident Action Plan.

Planning Process

It was recognized early in the development of the ICS that the critical factor of adequate planning for incident operations was often overlooked or not given enough emphasis. This resulted in poor use of resources, inappropriate strategies and tactics, safety problems, higher incident costs, and lower effectiveness.
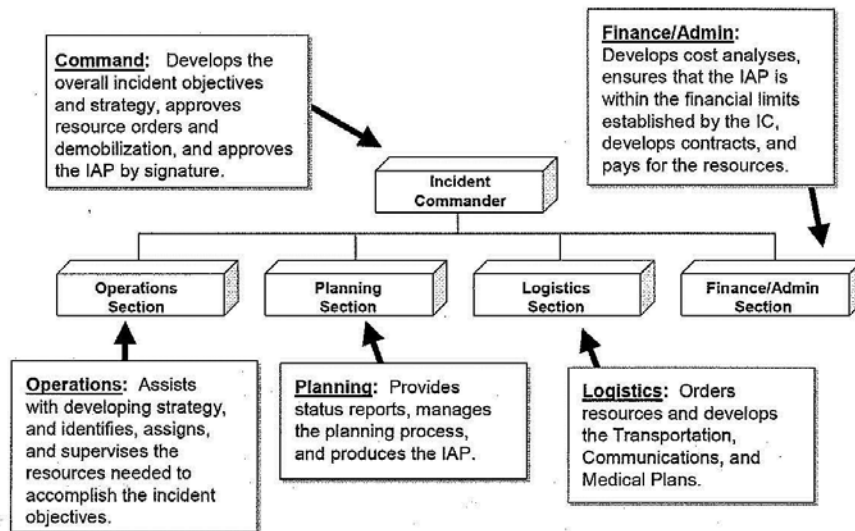
Those involved in the original ICS development felt that there was a need to develop a simple but thorough process for planning that could be utilized for both smaller, short-term incidents and events, and for longer, more complex incident planning. The planning process may begin with the scheduling of a planned event, the identification of a credible threat, or the initial response to an actual or impending event. The process continues with the implementation of the formalized steps and staffing required to develop a written Incident Action Plan (IAP).

The primary phases of the planning process are essentially the same for the Incident Commander who develops the initial plan, for the Incident Commander and Operations Section Chief revising the initial plan for extended operations, and for the incident management team developing a formal IAP, each following a similar process. During the initial stages of incident management, planners must develop a simple plan that can be communicated through concise verbal briefings. Frequently, this plan must be developed very quickly and with incomplete situation information. As the incident management effort evolves over time, additional lead time, staff, information systems, and technologies enable more detailed planning and cataloging of events and "lessons learned."

Planning involves:

- Evaluating the situation.
- Developing incident objectives.
- Selecting a strategy.
- Deciding which resources should be used to achieve the objectives in the safest, most efficient and cost-effective manner.
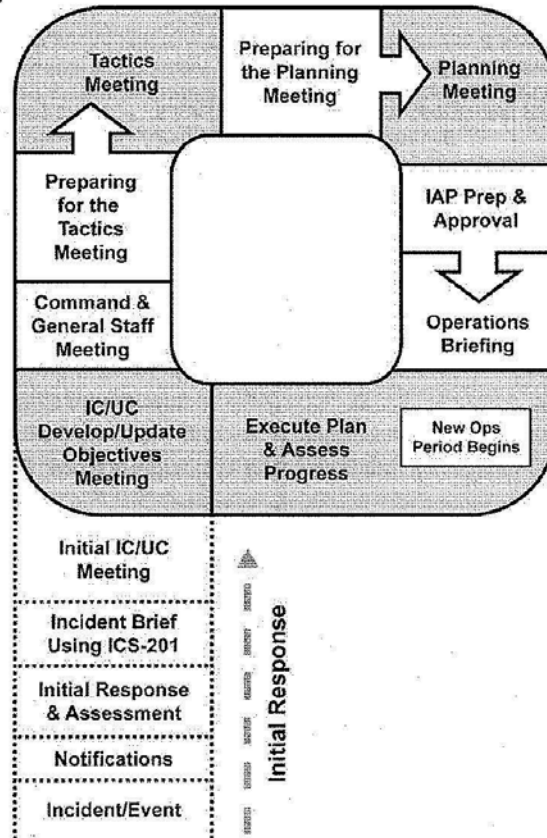
Planning Process

Command: Develops the overall incident objectives and strategy, approves resource orders and demobilization, and approves the IAP by signature.

Finance/Admin: Develops cost analyses, ensures that the IAP is within the financial limits established by the IC, develops contracts, and pays for the resources.

Incident Commander

| Operations Section | Planning Section | Logistics Section | Finance/Admin Section |

Operations: Assists with developing strategy, and identifies, assigns, and supervises the resources needed to accomplish the incident objectives.

Planning: Provides status reports, manages the planning process, and produces the IAP.

Logistics: Orders resources and develops the Transportation, Communications, and Medical Plans.

Caption: Organizational chart showing that Command develops the overall incident objectives and strategy, approves resource orders and demobilization, and approves the IAP by signature. Operations assists with developing strategy, and identifies, assigns, and supervises the resources needed to accomplish the incident objectives. Planning provides status reports, manages the planning process, and produces the IAP. Logistics orders resources and develops the Transportation, Communications, and Medical Plans. Finance/Administration develops cost analyses, ensures that the IAP is within the financial limits established by the Incident Commander, develops contracts, and pays for the resources.

Planning Process (Continued)

The Planning "P"

The Planning "P" diagram showing the planning process cycle with the following labeled boxes:

- Tactics Meeting
- Preparing for the Planning Meeting
- Planning Meeting
- Preparing for the Tactics Meeting
- IAP Prep & Approval
- Command & General Staff Meeting
- Operations Briefing
- IC/UC Develop/Update Objectives Meeting
- Execute Plan & Assess Progress
- New Ops Period Begins
- Initial IC/UC Meeting
- Incident Brief Using ICS-201
- Initial Response & Assessment
- Notifications
- Incident/Event
- Initial Response

- The Planning "P" is a guide to the process and steps involved in planning for an incident. The leg of the "P" describes the initial response period: Once the incident/event begins, the steps are Notifications, Initial Response & Assessment, Incident Briefing Using ICS 201, and Initial Incident Command (IC)/Unified Command (UC) Meeting.
- At the top of the leg of the "P" is the beginning of the first operational planning period cycle. In this circular sequence, the steps are IC/UC Develop/Update Objectives Meeting, Command and General Staff Meeting, Preparing for the Tactics Meeting, Tactics Meeting, Preparing for the Planning Meeting, Planning Meeting, IAP Prep & Approval, and Operations Briefing.
- At this point a new operational period begins. The next step is Execute Plan & Assess Progress, after which the cycle begins again.

Source: draft NIMS document

Planning Process (Continued)

Initial Response

Planning begins with a thorough size-up that provides information needed to make initial management decisions.

The ICS Form 201 provides Command Staff with information about the incident situation and the resources allocated to the incident. This form serves as a permanent record of the initial response to the incident and can be used for transfer of command.
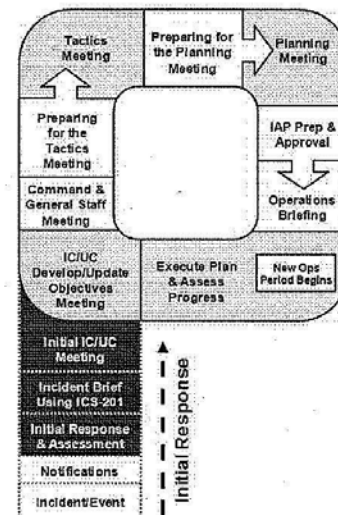

The Start of Each Planning Cycle

- **IC/UC Objectives Meeting:** The Incident Command/Unified Command establish incident objectives that cover the entire course of the incident. For complex incidents, it may take more than one operational period to accomplish the incident objectives.

  The cyclical planning process is designed to take the overall incident objectives and break them down into tactical assignments for each operational period. It is important that this initial overall approach to establishing incident objectives establish the course of the incident, rather than having incident objectives only address a single operational period.

- **Command and General Staff Meeting:** The Incident Command/Unified Command may meet with the Command and General Staff to gather input or to provide immediate direction that cannot wait until the planning process is completed. This meeting occurs as needed and should be as brief as possible.
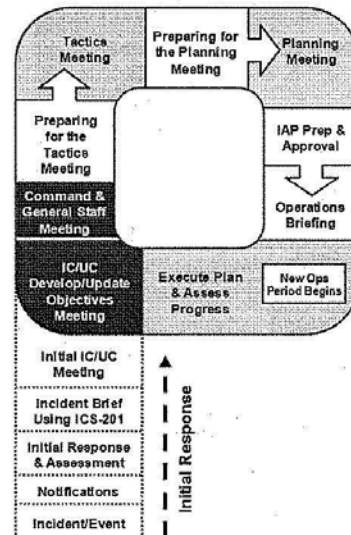
Planning Process (Continued)

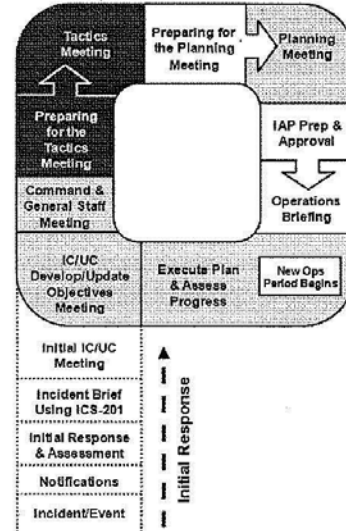### Preparing for and Conducting the Tactics Meeting

The purpose of the Tactics Meeting is to review the tactics developed by the Operations Section Chief. This includes the following:

- Determine how the selected strategy will be accomplished in order to achieve the incident objectives.
- Assign resources to implement the tactics.
- Identify methods for monitoring tactics and resources to determine if adjustments are required (e.g., different tactics, different resources, or new strategy).

The Operations Section Chief, Safety Officer, Logistics Section Chief, and Resources Unit Leader attend the Tactics Meeting. The Operations Section Chief leads the Tactics Meeting.

The ICS Forms 215, Operational Planning Worksheet, and 215A, Incident Safety Analysis, are used to document the Tactics Meeting.

Resource assignments will be made for each of the specific work tasks. Resource assignments will consist of the kind, type, and numbers of resources available and needed to achieve the tactical operations desired for the operational period. If the required tactical resources will not be available, then an adjustment should be made to the tactical assignments being planned for the Operational Period. It is very important that tactical resource availability and other needed support be determined prior to spending a great deal of time working on strategies and tactical operations that realistically cannot be achieved.

Planning Process (Continued)

Preparing for the Planning Meeting

Following the Tactics Meeting, preparations are made for the Planning Meeting, to include the following actions coordinated by the Planning Section:

- Review the ICS Form 215 developed in the Tactics Meeting.
- Review the ICS Form 215A, Incident Safety Analysis (prepared by the Safety Officer), based on the information in the ICS Form 215.
- Assess current operations effectiveness and resource efficiency.
- Gather information to support incident management decisions.
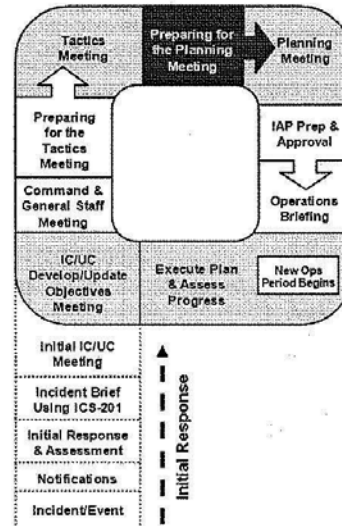
Planning Meeting

The Planning Meeting provides the opportunity for the Command and General Staff to review and validate the operational plan as proposed by the Operations Section Chief. Attendance is required for all Command and General Staff. Additional incident personnel may attend at the request of the Planning Section Chief or the Incident Commander. The Planning Section Chief conducts the Planning Meeting following a fixed agenda.

The Operations Section Chief delineates the amount and type of resources he or she will need to accomplish the plan. The Planning Section's "Resources Unit" will have to work with the Logistics Section to accommodate.

At the conclusion of the meeting, the Planning Section Staff will indicate when all elements of the plan and support documents are required to be submitted so the plan can be collated, duplicated, and made ready for the Operational Period Briefing.
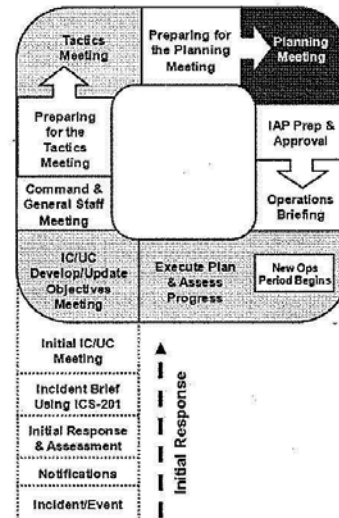
Planning Process (Continued)

IAP Preparation and Approval

The next step in the Incident Action Planning Process is plan preparation and approval. The written plan is comprised of a series of standard forms and supporting documents that convey the Incident Commander's intent and the Operations Section direction for the accomplishment of the plan for that Operational Period.

For simple incidents of short duration, the Incident Action Plan (IAP) will be developed by the Incident Commander and communicated to subordinates in a verbal briefing. The planning associated with this level of complexity does not demand the formal planning meeting process as highlighted above.

Certain conditions result in the need for the Incident Commander to engage a more formal process. A written IAP should be considered whenever:

- Two or more jurisdictions are involved in the response.
- The incident continues into the next Operational Period.
- A number of ICS organizational elements are activated (typically when General Staff Sections are staffed).
- It is required by agency policy.
- A Hazmat incident is involved (required).
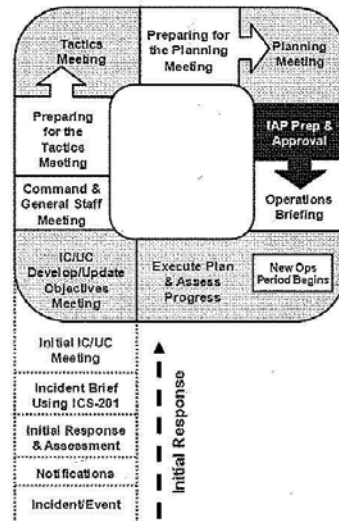
Operations Period Briefing

The Operations Period Briefing may be referred to as the Operational Briefing or the Shift Briefing. This briefing is conducted at the beginning of each Operational Period and presents the Incident Action Plan to supervisors of tactical resources.

Following the Operations Period Briefing supervisors will meet with their assigned resources for a detailed briefing on their respective assignments.
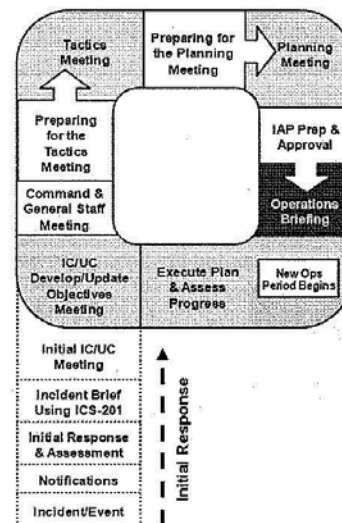
Planning Process (Continued)

Execute Plan and Assess Progress

The Operations Section directs the implementation of the plan. The supervisory personnel within the Operations Section are responsible for implementation of the plan for the specific Operational Period.

The plan is evaluated at various stages in its development and implementation. The Operations Section Chief may make the appropriate adjustments during the Operational Period to ensure that the objectives are met and effectiveness is assured.
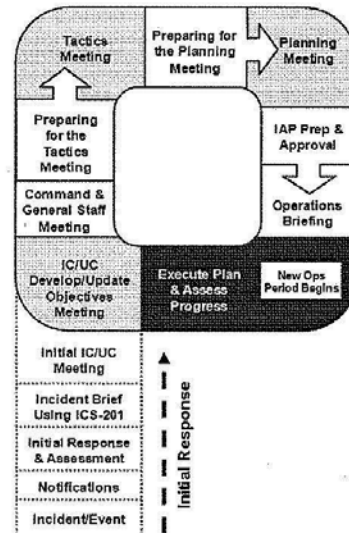
ICS Forms

The ICS uses a series of standard forms and supporting documents that convey directions for the accomplishment of the objectives and distributing information. Listed below are the standard ICS form titles and descriptions of each form:

Standard Form Title	Description
Incident Action Plan Cover Page ICS 200	Indicates the incident name, plan operational period, date prepared, approvals, and attachments (resources, organization, Communications Plan, Medical Plan, and other appropriate information).
Incident Briefing ICS 201	Provides the Incident Command/Unified Command and General Staffs with basic information regarding the incident situation and the resources allocated to the incident. This form also serves as a permanent record of the initial response to the incident.
Incident Objectives ICS 202	Describes the basic strategy and objectives for use during each operational period.
Organization Assignment List ICS 203	Provides information on the response organization and personnel staffing.
Field Assignment ICS 204	Used to inform personnel of assignments. After Incident Command/Unified Command approve the objectives, staff members receive the assignment information contained in this form.
Incident Communications Plan ICS 205	Provides, in one location, information on the assignments for all communications equipment for each operational period. The plan is a summary of information. Information from the Incident Communications Plan on frequency assignments can be placed on the appropriate Assignment form (ICS Form 204).
Medical Plan ICS 206	Provides information on incident medical aid stations, transportation services, hospitals, and medical emergency procedures.
Incident Status Summary ICS 209	Summarizes incident information for staff members and external parties, and provides information to the Public Information Officer for preparation of media releases.
Check-In/Out List ICS 211	Used to check in personnel and equipment arriving at or departing from the incident. Check-in/out consists of reporting specific information that is recorded on the form.
General Message ICS 213	Used by: • Incident dispatchers to record incoming messages that cannot be orally transmitted to the intended recipients. • EOC and other incident personnel to transmit messages via radio or telephone to the addressee. • Incident personnel to send any message or notification that requires hard-copy delivery to other incident personnel.

ICS Forms (Continued)

Standard Form Title	Description
Unit Log ICS 214	Provides a record of unit activities. Unit Logs can provide a basic reference from which to extract information for inclusion in any after-action report.
Operational Planning Worksheet ICS 215	Documents decisions made concerning resource needs for the next operational period. The Planning Section uses this Worksheet to complete Assignment Lists, and the Logistics Section uses it for ordering resources for the incident. This form may be used as a source document for updating resource information on other ICS forms such as the ICS 209.
Incident Action Plan Safety Analysis ICS 215A	Communicates to the Operations and Planning Section Chiefs safety and health issues identified by the Safety Officer.
Air Operations Summary ICS 220	Provides information on air operations including the number, type, location, and specific assignments of helicopters and fixed-wing aircraft.
General Plan ICS 226	Addresses long-term objectives approved by Incident Command/ Unified Command. These objectives are often expressed as milestones (i.e., timeframes for the completion of all and/or portions of incident response operations). A General Plan should identify the major tasks to be carried out through to the end of emergency response operations, the duration of the tasks, and the major equipment and personnel resources needed to accomplish the tasks within the specified duration.

Demobilization

Demobilization planning helps to:

- Eliminate waste in resources.
- Eliminate potential fiscal and legal impacts.
- Ensure a controlled, safe, efficient, and cost-effective release process.

Demobilization policies and procedures depend on size of incident and may involve:

- Fiscal/legal policies and procedures.
- Work rules.
- Special license requirements.
- Other requirements.

Disaster Walkthrough Scripts

When a disaster strikes this state, it is important for Oregonians to pull together and assist those in need. Disasters can take many forms whether they are earthquakes, tsunamis, fires, pandemics, tornados, floods, or acts of terrorism. While some disasters are more common (forest fires, pandemics, floods) than others (terrorism, tsunamis), it is important to be prepared. As a procurement official, you can play a part in mitigating and recovering from a disaster.

What follows is a walkthrough and script of what happens when a disaster strikes.

Emergency Declaration

The whole process starts when the Governor declares a disaster and notifies the Department of Forestry Agency Operation Center (AOC), the Public Health Agency Operation Center (AOC), or the Oregon Emergency Management Emergency Coordination Center (ECC). This will depend on the type of disaster that occurs (Department of Forestry – forest fires, Public Health Agency – pandemics, Oregon Emergency Management – all other disasters).

Designation of Responsibilities

The above centers receive calls and requests for resources from local disaster command centers. Depending on the nature of the disaster and the type of emergency support needed, the request will go to the agency designated with the primary responsibility for that particular emergency support function (ESF). In filling each request for resources, the agency with primary responsibility may request help from an agency with support or adjunct responsibility in this functional area. The Office of Emergency Management provides the State of Oregon Emergency Support Functions and Agency Assignments list biannually in their Emergency Operation Plan. This list details which agencies have primary, secondary or adjunct emergency support responsibilities. See Appendix A for a copy of the list or use this link:

http://www.oregon.gov/OMD/ODEM/plans_train/docs/eop/esf_0.pdf

Procurement Support

Procurement plays an extensive support role in providing nearly every resource needed in a disaster. Surges of requests from many agencies are a likely result of any emergency declaration.

In order to handle the surge of requests, agency procurement specialists have developed a corresponding plan to ensure emergency resource needs are met in an efficient and timely manner. ODF, DHS, and DAS SPS will designate a Coordinating Supervisor to activate this procurement plan, and they will determine if they have a staff available to perform the required procurements.

CHRO Procurement Staff Process

If staffing is not available, the Agency management will contact Department of Administrative Services – Chief Human Resource Office (DAS-CHRO):

> *Hello, this is (**requesting manager's name**) from the (**requesting Agency**). We are conducting procurements for the disaster in (**location of the event**). I will need additional staff to assist.*

> *I am in need of (**quantity of staff**) for (**duration required**). Experience in procurement is preferred, but not necessary. They will be working from their own locations and the expenditures they make will be paid by their Agency. They will receive instructions via e-mail and fax. They will need to start (**starting date**).*

Receiving Requests

Once the Buyers have been identified, they will start receiving purchase requests from either the AOC or ECC that will include an ODEM number. This number is required for tracking purposes and is to be entered on the Event Log.

Buyers need to ensure they have a clear understanding of what resource is required. Be sure to ask questions such as:

> The function of the resource
> Quantity (If more than one, should they all be the same?) Size Capacity
> Transportation, Delivery, Operational, Storage Needs

Identify Suppliers

The Buyer will search for the supplies using state eprocurement system, GSA schedule, Google, phone book, or other sources. State surplus has already been contacted by this point, so there is no need to contact them.

Procuring the Resource

Once the supplier has been identified, the Buyer can contact the Supplier:

> *Hello, my name is (**name of Buyer**). I am (**from or representing**) the Oregon State Procurement Services. The Governor has declared a disaster in (**location of event**).*

> *I am looking for (**item required and the quantity needed**). Would you be able to supply that?*

If yes, then you will need to ask the following questions:

> *What is the cost?*
> *Will you deliver? What is the delivery charge? How soon can you deliver? If this is a will call, when will it be ready for pick up? At what address?*
> *How would you like payment (direct bill, purchase order, credit card)?*

Bill Us: *The invoice can be emailed to (**Buyer's email address**) or faxed to (**Buyer's fax number**). Your reference number is (**ODEM Incident Number**).*

Purchase Order: *Please use PO number (**PO number generated by Buyer**) and email invoice to (**Buyer's email address**) or fax to (**Buyer's fax number**). Your reference number is (**ODEM Incident Number**).*

SPOTS Card: *You will be contacted within the next hour by a SPOTS card holder who will give you the credit card information. The reference is (**ODEM Incident Number**). Please email invoice to (**Buyer's email address**) or fax to (**Buyer's fax number**).*

Thank you for your assistance with these supplies.

If no, ask them if they know of other options to meet the same need or any other supplies in the area that may be able to assist, then move on to the next supplier.

If the payment is to be done with a SPOTS card, the Finance Coordinator will need to be contacted to locate a SPOTS card holder with the approved single transaction limits as well as an account balance that can handle the transaction:

*Hello, this is (**Buyer's name**). I need a SPOTS card payment in the amount of (**dollar amount of purchase**). Who can I contact?*

The Finance Coordinator will provide the contact information for the appropriate person to the Buyer. The Buyer will contact the SPOTS card holder for payment:

*Hello, my name is (**Buyer's name**). I am purchasing supplies for the disaster in (**location of event**). I was given your name by (**Finance Coordinator**) as a SPOTS card holder that can assist a purchase. I need a payment for supplies.*

*You will need to call (**contact name of supplier**) of (**business name**) at (**phone number of supplier**). They are expecting credit card payment in the amount of (**dollar amount**) for (**supplies being purchased**). The reference number is (**ODEM Incident Number**).*

*Please confirm payment to me at (**Buyer's phone number or email address**). Thank you.*

The Buyer will notify the Coordinating Supervisor of the order status:

*This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and will be delivered on (**delivery date**).*

OR

*This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and can be picked up on (**delivery date**) from (**supplier name and location**).*

The Buyer will also need to update the Finance Coordinator of the status of the orders placed with a SPOTS card as soon as it has been completed. This is to ensure that cards do not get maxed out:

> *Hello, this is (**Buyer's name**). I have an update on a purchase. It is ODEM action number (**ODEM action number**) and incident number (**incident number**). The (**supplies ordered**) were purchased from (**supplier business name**) and delivered to (**name of the person or location receiving the supplies**). The cost of the order was (**cost**). It was charged to a SPOTS card holder (**card holder name**).*

After the purchase is completed, the Buyer is to confirm receipt of the supplies:

> *Hello, my name is (**Buyer's name**). I am calling to confirm the delivery of (**supplies ordered**). Can you give me a date and time of delivery? Thank you.*

<div align="center">OR</div>

> *Hello, this is (**Buyer's name**) (**from or representing**) the Oregon Procurement Services Office. I am calling to confirm the pick-up of the supplies I ordered earlier. Do you have the date and time they were picked up? Thank you.*

The Buyer will in turn notify the Coordinating Supervisor of the order status:

> *This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and was delivered on (**delivery date**).*

<div align="center">OR</div>

> *This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and were picked up on (**delivery date**) from (**supplier name and location**).*

Finalizing the Order

The Coordinating Supervisor will relay this information to the ECC or OAC to close out the purchase.

The Buyer will forward all of the procurement files for each purchase on to the Coordinating Supervisor. They will work with the Financial Coordinator on any and all possible FEMA reimbursements.

Once the Governor declares the disaster is over, the Buyer is released back to their normal duties.

This process will be a great step in mitigating further damages during a disaster as well as getting a head start in the recovery process.

Individual Scripts
Coordinating Supervisor Scripts

To EHRS (request staffing):

*Hello, this is (**requesting manager's name**) from the (**requesting Agency**). We are conducting procurements for the disaster in (**location of the event**). I will need additional staff to assist.*

*I am in need of (**quantity of staff**) for (**duration required**). Experience in procurement is preferred, but not necessary. They will be working from their own locations and the expenditures they make will be paid by their Agency. They will receive instructions via e-mail and fax.*
*They will need to start (**starting date**).*

To EHRS or OAC (report order status):

*This is (**Coordinating Supervisor's name**) of (**Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and will be delivered on (**delivery date**).*

OR

*This is (**Coordinating Supervisor's name**) of (**Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and can be picked up on (**delivery date**) from (**supplier name and location**).*

To ECC or OAC (report delivery):

*This is (**Coordinating Supervisor's name**) of (**Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) was delivered on (**delivery date**).*

OR

*This is (**Coordinating Supervisor's name**) of (**Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been picked up on (**delivery date**) from (**supplier name and location**).*

Buyer Scripts

To supplier:

*Hello, my name is (**name of Buyer**). I am (**from or representing**) the Oregon Procurement Services Office. The Governor has declared a disaster in (**location of event**).*

*I am looking for (**item required and the quantity needed**). Would you be able to supply that?*

If yes, then you will need to ask the following questions:

> *What is the cost?*
> *Will you deliver? What is the delivery charge? How soon can you deliver? If this is a will call, when will it be ready for pick up? At what address?*
> *How would you like payment (direct bill, purchase order, credit card)?*

> **Bill Us**: *The invoice can be emailed to (**Buyer's email address**) or faxed to (**Buyer's fax number**). Your reference number is (**ODEM Incident Number**).*

> **Purchase Order**: *Please use PO number (PO number generated by Buyer) and email invoice to (Buyer's email address) or fax to (Buyer's fax number). Your reference number is (ODEM Incident Number).*

> **SPOTS Card:** *You will be contacted within the next hour by a SPOTS card holder who will give you the credit card information. The reference is (**ODEM Incident Number**). Please email invoice to (**Buyer's email address**) or fax to (**Buyer's fax number**).*

> *Thank you for your assistance with these supplies.*

If no, ask them if they know of other options to meet the same need or any other supplies in the area that may be able to assist, then move on to the next supplier.

To Finance Coordinator for SPOTS card holder information:

> *Hello, this is (**Buyer's name**). I need a SPOTS card payment in the amount of (**dollar amount of purchase**). Who can I contact?*

To SPOTS card holder for SPOTS card information:

> *Hello, my name is (**Buyer's name**). I am purchasing supplies for the disaster in (**location of event**). I was given your name by (**Finance Coordinator**) as a SPOTS card holder that can assist a purchase. I need a payment for supplies.*

> *You will need to call (**contact name of supplier**) of (**business name**) at (**phone number of supplier**). They are expecting credit card payment in the amount of (**dollar amount**) for (**supplies being purchased**). The reference number is (**ODEM Incident Number**).*

> *Please confirm payment to me at (**Buyer's phone number or email address**). Thank you.*

To Finance Coordinator to update SPOTS card purchases:

> *Hello, this is (**Buyer's name**). I have an update on a purchase. It is ODEM action number (**ODEM action number**) and incident number (**incident number**). The (**supplies ordered**) were purchased from (**supplier business name**) and delivered to (**name of the person or location receiving the supplies**). The cost of the order was (**cost**). It was charged to a SPOTS card holder (**card holder name**).*

To Receiver to confirm delivery:

*Hello, my name is (**Buyer's name**). I am calling to confirm the delivery of (**supplies ordered**). Can you give me a date and time of delivery?*

Thank you.

<div align="center">OR</div>

*Hello, this is (**Buyer's name**) (**from or representing**) the Oregon Procurement Services Office. I am calling to confirm the pick-up of the supplies I ordered earlier. Do you have the date and time they were picked up?*

Thank you.

To Coordinating Supervisor of the order status:

*This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and was delivered on (**delivery date**).*

<div align="center">OR</div>

*This is (**Buyer's name**) of (**assisting Agency**). The supplies requested under ODEM Action Number (**ODEM action number**) and incident number (**incident number**) have been ordered and were picked up on (**delivery date**) from (**supplier name and location**).*

Emergency Support Function Annexes

State of Oregon EOP

Emergency Support Function Annexes

ESF Overview

STATE OF OREGON EMERGENCY SUPPORT FUNCTIONS AND AGENCY ASSIGNMENTS

P = Primary Agency:

Responsible for Management of the ESF; devise, coordinate and implement disaster recovery plans for the ESF.

S = Supporting Agency:

Responsible to provide expertise, experience and assets to the ESF as needed or requested by the Primary agency

A = Adjunct Agency:

Organizations not part of State Government but with direct interest in effective disaster recovery

Emergency Support Function	Transportation	Communications	Public Works & Engineering	Fire Fighting	Emergency Management	Mass Care, Emergency Assistance, Housing & Human Services	Logistics Management & Resource Support	Public Health & Medical Services	Search & Rescue	Oil & Hazardous Materials	Agriculture & Natural Resources	Energy	Public Safety & Security	Long-Term Community Recovery	External Affairs
	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Administrative Services, Department of (DAS)	S	S	S		S	S	P	S					S	S	S	S
Agriculture, Department of (ODA)					S	S		S			P			S	
Aviation, Department of (AERO)	S				S				S						
Consumer & Business Services, Department of (DCBS)			S		S									S	
Building Codes Division (BCD)			S		S										
Occupational Safety & Health Division (OSHD)			S		S			S		S	S				
Corrections, Department of (DOC)	S				S									S	
Business Development Department (OBDD)			S		S									P	
Energy, Department of (ODOE)	S				S					S		P			
Environmental Quality, Department of (DEQ)			S		S					P					
Fish & Wildlife, Department of (ODFW)					S			S		S	S		S		
Forestry, Department of (ODF)	S	S		P	S		S			S					
Geology & Mineral Industries, Department of (DOGAMI)			S		S										
Justice, Department of (DOJ)					S								P		
Housing & Community Services, Oregon (OHCS)					S	S								S	
Human Services, Department of (DHS)					S	P		P		S	S	S			
Public Health Division (PHD)					S			P		S	S				S
Land Conservation and Development, Department of (DLCD)					S									S	
Military, Oregon Department of (OMD)	S	S	S	S	S	S	P	S	S		S	S	S		S
Office of Emergency Management, (OEM)		P			P	S	S		P	S				P	P
Public Utility Commission (PUC)		P			S							P			
State Lands, Department of (DSL)	S		S		S					S	S				S
State Police, Oregon (OSP)	S	S			S					S			P		S
State Fire Marshal, Office of the (OSFM)	S			P	S				P	P					S

01/06/2014

STATE OF OREGON EMERGENCY SUPPORT FUNCTIONS AND AGENCY ASSIGNMENTS															
P = Primary Agency: Responsible for Management of the ESF; devise, coordinate and implement disaster recovery plans for the ESF. S = Supporting Agency: Responsible to provide expertise, experience and assets to the ESF as needed or requested by the Primary agency A = Adjunct Agency: Organizations not part of State Government but with direct interest in effective disaster recovery	Transportation	Communications	Public Works & Engineering	Fire Fighting	Emergency Management	Mass Care, Emergency Assistance, Housing & Human Services	Logistics Management & Resource Support	Public Health & Medical Services	Search & Rescue	Oil & Hazardous Materials	Agriculture & Natural Resources	Energy	Public Safety & Security	Long-Term Community Recovery	External Affairs
Emergency Support Function	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
Transportation, Department of (ODOT)	P	S	P		S		S		S	S		S	S		S
Water Resources Department (WRD)			S		S										
American Red Cross (ARC)					A	A		A	A		A				
ARES/RACES		A			A										
Civil Air Patrol (CAP)	A	A						A		A	A				
OR Volunteer Organizations Active in Disaster (ORVOAD)					A	A									

(ADJUNCT AGENCIES — applies to American Red Cross (ARC), ARES/RACES, Civil Air Patrol (CAP), OR Volunteer Organizations Active in Disaster (ORVOAD))

01/06/2014