

Community Emergency Response Team (CERT) Program Manager Course

G427 Instructor Guide

Developed For:

**National CERT Program
Federal Emergency Management Agency
Department of Homeland Security
Washington, D.C.**

Developed By:

**PerformTech Inc.
Alexandria, Virginia**

May 2011

COMMUNITY EMERGENCY RESPONSE TEAM

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COURSE OVERVIEW AND INSTRUCTOR RESPONSIBILITIES

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COMMUNITY EMERGENCY RESPONSE TEAM
Course Overview and Instructor Responsibilities

COURSE PURPOSE

The purpose of this Community Emergency Response Team (CERT) *Program Manager* course is to prepare CERT Program Managers for the tasks required to establish and sustain an active local CERT program.

OVERALL COURSE OBJECTIVES

Upon completing this course, the participants should be able to:

1. Define the purpose and core components of a local CERT program.
2. Use strategic planning to define the mission and goals for a local CERT program.
3. Describe the purposes and strategies for promoting a local CERT program.
4. Establish a process for working with volunteers.
5. Establish a process for working with instructors.
6. Establish a process for acquiring and managing program resources.
7. Build a plan for delivering and managing safe training and exercises.
8. Describe the role of policies and procedures in operating a local CERT program.
9. Develop a process for evaluating a local CERT program.
10. Describe how to sustain a local CERT program.

In addition to the overall course objectives listed above, each unit has specific objectives.

COMMUNITY EMERGENCY RESPONSE TEAM
Course Overview and Instructor Responsibilities

TARGET AUDIENCE

The target audience for this course includes the following:

- Professionals and volunteers who are designated to be or are interested in being appointed a local CERT Program Manager
- Those who are already in the CERT Program Manager position

PREREQUISITES

Prerequisites for anyone who wants to attend the *CERT Program Manager* course include the following:

- A referral from a CERT sponsoring agency. The CERT sponsoring agency could be a local, regional, or State government agency
- Approval from a State CERT coordinating agency if the *CERT Program Manager* course is sponsored by such an agency
- Completion of the *CERT Basic Training* course

COURSE MATERIALS

The *CERT Program Manager* course includes these materials:

1. Instructor Guide (includes administrative, logistical, and preparation information; lesson plan; instructor notes; mini PowerPoint slides; instructions for all activities; all participant handouts and job aids)
2. Participant Manual (key content, activity worksheets, all handouts, and job aids)
3. PowerPoint slides

COMMUNITY EMERGENCY RESPONSE TEAM
Course Overview and Instructor Responsibilities

COURSE AGENDA

This is a 3-day course. The first and second days run about 8.5 hours each. The third day runs about 4 hours.

Day 1

8:30 – 10:00 a.m.	Unit 1: Course Introduction, Overview, and Pre-Test
10:00 – 10:15 a.m.	<i>Break</i>
10:15 – 11:15 a.m.	Unit 2: Setting a Program Vision
11:15 – 11:30 a.m.	<i>Break</i>
11:30 a.m. – 12:30 pm.	Unit 2: Setting a Program Vision (cont'd)
	Lunch
1:30 – 2:30 p.m.	Unit 3: Promoting Your Program
2:30 – 2:45 p.m.	<i>Break</i>
2:45 – 3:45 p.m.	Unit 3: Promoting Your Program (cont'd)
3:45 – 4:00 p.m.	<i>Break</i>
4:00 – 5:00 p.m.	Unit 4: Working with Volunteers

Day 2

8:00 – 9:00 a.m.	Unit 4: Working with Volunteers (cont'd)
9:00 – 9:15 a.m.	<i>Break</i>
9:15 – 10:15 a.m.	Unit 5: Working with Instructors
10:15 – 10:30 a.m.	<i>Break</i>
10:30 – noon	Unit 6: Procuring and Managing Resources
	Lunch
1:00 – 2:00 p.m.	Unit 7: Training and Exercises
2:00 – 2:15 p.m.	<i>Break</i>
2:15 – 3:15 p.m.	Unit 7: Training and Exercises (cont'd)
3:15 – 3:30 p.m.	<i>Break</i>
3:30 – 4:30 p.m.	Unit 8: Policies and Procedures

Day 3

8:00 – 9:00 a.m.	Unit 9: Program Evaluation
9:15 – 9:30 a.m.	<i>Break</i>
9:30 – 10:30 a.m.	Unit 10: Keeping Your Program Going
10:30 – 10:45 a.m.	<i>Break</i>
10:45 – noon	Unit 11: Course Summary and Conclusion

COMMUNITY EMERGENCY RESPONSE TEAM
Course Overview and Instructor Responsibilities

INSTRUCTOR QUALIFICATIONS

Instructors will be recruited and selected to conduct this course based on the following qualifications:

- Completion of the *CERT Basic Training* course
- Completion of the *CERT Train-the-Trainer* course
- Completion of the *CERT Program Manager* course
- Extensive training experience
- State-level approval

PREPARING TO TRAIN

The preparation and conduct of the instructor has a definite impact on the effectiveness of the training. This introductory section provides guidelines for preparing for this course. Use the following steps when you prepare for training:

- Thoroughly read both the Instructor Guide and the Participant Manual.
- Conduct a walk-through of all exercises and be prepared to answer any questions the participants ask while completing the exercises themselves.
- Instructors are encouraged to add pertinent information to the course, but topics should not be deleted.
- It is recommended this course be taught to groups of 15 to 25 participants with a maximum of 40 participants.
- The activities developed for this course are essential for critical learning. Follow the Instructor Guide to help assure that these activities are conducted during the course.
- For State and local course offerings, where time may be limited, the instructor should be prepared to conduct an optional lunch forum for questions and answers.

COMMUNITY EMERGENCY RESPONSE TEAM
Course Overview and Instructor Responsibilities

PREPARING THE CLASSROOM

As an instructor, you are responsible for:

- The equipment that you need for the course

For each session, you will need:

- A computer with PowerPoint software (PowerPoint 97 or more recent)
- A computer projector and screen
- Whiteboard or chart paper with easel and markers
- Masking tape
- Pens and pencils

Session-specific equipment and materials are listed at the beginning of the Instructor Notes for each unit.

- The room arrangement

Regardless of the room arrangement you select, the training room must be large enough to accommodate the demonstrations and hands-on exercises for each session. Particularly for larger groups, a U-shaped seating arrangement is preferable so as to facilitate group interactions and media visibility.

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UNIT 1: INTRODUCTION AND OVERVIEW

In this unit you will learn about:

- **The Instructors and the Participants.** Who is teaching the course and who is taking the course.
- **The *Community Emergency Response Team (CERT) Program Manager Course Preview.*** Course purpose, course learning objectives, and course agenda.
- **What a CERT Program Is.** How and why CERT programs were developed, core components of a CERT program, and how CERT programs interact with the emergency response system and the community.
- **The Draft Program Plan.** A template for participants to use throughout the course and continue to update after completing the course.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

LEARNING OBJECTIVES/ PERFORMANCE OUTCOMES	<p>At the conclusion of this unit, the participants will be able to:</p> <ul style="list-style-type: none">▪ Define the purpose and core components of a local CERT program.
SCOPE	<p>The topics that will be discussed in this unit are:</p> <ul style="list-style-type: none">▪ Welcome▪ Participant Introductions▪ Participant Expectations▪ Course Preview▪ What Is a CERT Program?▪ The Draft Program Plan▪ Unit Summary
ESTIMATED COMPLETION TIME	1.5 hours
TRAINING METHODS	<p>The lead instructor will distribute the Pre-Test and ask participants to complete it. The lead instructor will collect the Pre-Test prior to beginning the unit instruction.</p> <p>The lead instructor will begin by welcoming the participants to the course. All the instructors will introduce themselves. The lead instructor will make any necessary administrative announcements.</p> <p>Next, the instructor will ask participants to briefly introduce themselves. During this activity, each participant will:</p> <ul style="list-style-type: none">▪ Introduce himself or herself▪ Say what CERT program he/she is with▪ Volunteer his or her expectations for the course, which the instructor will record on an easel pad and post on the walls for later review. <p>The instructor will then briefly explain the course purpose, course objectives, and course materials.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

TRAINING METHODS (CONTINUED)

Next the instructor will review the course agenda.

The instructor will lead a guided discussion of how and why CERT programs developed, the core components of a CERT program, and how CERT programs work with and interact with the emergency response system and with the community.

Next, the instructor will introduce the blank Draft Program Plan that participants will work on throughout the course and that will be the basis for the ongoing plan for their program.

The instructor will conclude with a brief summary of what was discussed in the unit.

Please be advised that, as a general rule, the instructor is encouraged to add pertinent information to this guide, but should never delete topics.

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide (for Program Manager instructors)*
- *Community Emergency Response Team Program Manager Participant Manual (for all participants)*
- PowerPoint slides 1-1 to 1-21
- Copies of the Pre-Test, one for each participant

EQUIPMENT

The following additional equipment is required for this unit:

- A computer with PowerPoint software
- A computer projector and screen
- Masking tape (for posting the participant expectations)
- Easel pad and easel or whiteboard
- Markers

PREPARATION

- Prior to class, make copies of the Pre-Test, one for each participant. The Pre-Test follows these notes, just prior to the lesson plan for the unit.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

NOTES

A suggested time plan for this unit is as follows:

Pre-Test..... 10 minutes

Welcome 10 minutes

Participant Introductions40 minutes

Course Preview5 minutes

Course Agenda.....2 minutes

What Is a CERT Program?20 minutes

The Draft Program Plan.....2 minutes

Unit Summary.....1 minute

Total Time: 1.5 hours

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

REMARKS

Pre-Test

As you distribute the Pre-Test, explain that you will collect them but that they will not be graded in any way. The Pre-Test helps the instructors know where to focus attention during the training. The Pre-Test will be returned to participants at the conclusion of the training so they can see progress made.

Answers for the Pre-Test:

1. b
2. d
3. a
4. a, b, c, d
5. There should be checkmarks in every box.
6. e
7. b
8. c
9. a
10. b
11. d
12. a
13. a, b, d
14. b
15. d
16. a, c, d, e, f
17. a, b, c, d, e

Expectations

Record participant expectations on an easel pad. Hang the pages on the walls of the classroom so they are reminders during the training. You will return to them at the end of the course to see how well the expectations were met.

CERT Program Manager Pre-Test

Name: _____

You have 10 minutes to complete this Pre-Test.

1. When did CERT programs first come into existence?
 - a. 1980-1984
 - b. 1985-1989
 - c. 1990-1994
 - d. 1995-1999

2. A CERT program is NEVER involved with this activity.
 - a. Missing person search
 - b. Crowd and traffic control
 - c. Debris removal after a flood
 - d. Conducting search and rescue operations in a collapsed building
 - e. Supplementing fire tower staff during fire season

3. A Program Manager needs to prepare before meeting with a potential partner. Which of these does not need to be done during that preparation?
 - a. Develop a newsletter.
 - b. Prepare talking points.
 - c. Research the organization.
 - d. Prepare a program description.
 - e. Identify ways you can help each other.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

4. One way to evaluate your program's goals is with a SWOT Analysis. What does a SWOT Analysis help you identify? Circle all that apply.
- a. Strengths
 - b. Threats
 - c. Weaknesses
 - d. Opportunities

5. Check which activities you do with which group.

	Volunteers	Instructors
Recruit		
Orient		
Track		
Manage		
Retain		
Terminate		

6. What issue is a Program Manager NOT likely to address when managing resources?
- a. What resources do I need?
 - b. Where will I get the resources?
 - c. How much will the resources cost?
 - d. Where will I store the resources?
 - e. How do I get rid of excess resources?
7. Every CERT program has the same goal.
- a. True
 - b. False

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW


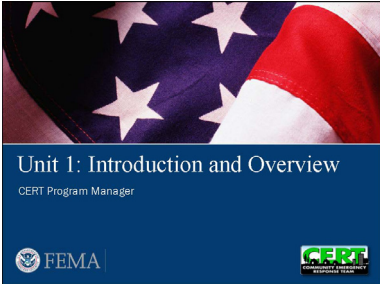
8. _____ is an important part of program evaluation, risk management, goal setting, and funding.
- A training facility
 - Program promotion
 - Good recordkeeping
 - A Program Report
9. What is the first thing to do when approaching funders and partners?
- Create a program description.
 - Schedule a one-on-one meeting.
 - Develop a plan for approaching the funder or partner.
10. The *CERT Basic Training* should never be tailored by the local CERT program.
- True
 - False
11. A CERT program should create a Training and Exercise Plan that complies with the requirements of: (Select one.)
- NIMS
 - ISO 700
 - Homeland Security Act
 - HSEEP
12. Which comes first? (Choose the best answer.)
- Setting goals for the program
 - Promoting the program
 - Finding funding for the program
 - Educating people about the program

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

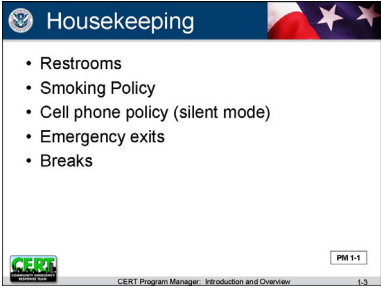
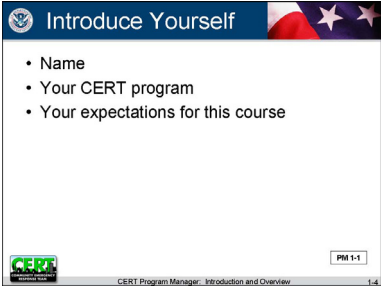
13. These are some signs that policies and procedures need to be reviewed and updated. Choose all that apply.
- An increase in the number of injuries or ineffective team operations
 - More questions on what are “normal operations” or a feeling of general confusion
 - Too many volunteers
 - Complaints about poor performance from the sponsoring agency, partners, or the community
 - An increase in donations
14. A particularly important policy area is _____.
- The correct CERT uniform
 - Safety concerns during CERT activities and CERT training
 - That every CERT member recruit one new member
 - What funding the program will accept
15. A Program Report should be developed at least:
- Weekly
 - Monthly
 - Bi-monthly
 - Annually
16. Program objectives have five characteristics. Circle the five that apply.
- Achievable
 - Funded
 - Realistic
 - Timely
 - Measurable
 - Simple
17. Keeping a program going involves these critical elements. Circle all that apply.
- Volunteers are retained.
 - Skills are sharpened.
 - Teams respond effectively.
 - The program is administered capably.
 - There is external program support.

Unit 1: Introduction and Overview

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-1</p>	<p>Roster</p> <p>As the participants are arriving, develop a class roster by passing around a sheet of paper. Ask the participants to write down their name, address, phone number, and e-mail address, or to check themselves on a previously developed roster to confirm that their contact information is correct.</p>
	<p>Pre-Test</p> <p>Distribute the Pre-Test. Explain that you will collect the Pre-Test but that the Pre-Test will not be graded in any way. The Pre-Test helps the instructors know where to focus attention during the training. The Pre-Test will be returned to participants at the conclusion of the training so they can see progress made.</p> <p>Tell participants that they have 10 minutes to complete the Pre-Test.</p> <p>Collect the Pre-Test after 10 minutes, or sooner if all participants appear to have completed it.</p>
 <p>Display Slide 1-2</p>	<p>Welcome</p> <p>Welcome the participants to the <i>Community Emergency Response Team Program Manager</i> course.</p> <p>Introduce yourself and provide some background information about your past experiences with CERT, with training, and/or as a CERT Program Manager.</p> <p>Ask other instructors to introduce themselves in the same way.</p>

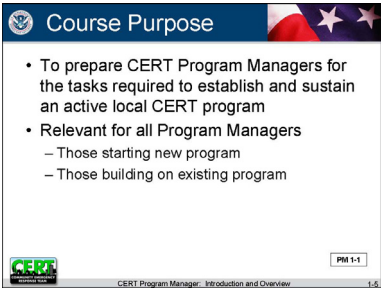
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Housekeeping</p> <ul style="list-style-type: none">• Restrooms• Smoking Policy• Cell phone policy (silent mode)• Emergency exits• Breaks <p>Display Slide 1-3</p> <p>Make any administrative announcements at this time.</p>	<h3>Housekeeping</h3> <ul style="list-style-type: none">▪ Restrooms▪ Smoking and cell phone policies▪ Emergency exits▪ Breaks (when the first break will be)▪ Other
 <p>Introduce Yourself</p> <ul style="list-style-type: none">• Name• Your CERT program• Your expectations for this course <p>Display Slide 1-4</p> <p>Tell participants that each introduction must not be longer than 1 minute. Manage introductions accordingly.</p> <p>Record the responses on easel pad pages. Post the pages on the wall.</p> <p>Don't linger over this activity.</p>	<h3><i>Participant Introductions</i></h3> <p>Ask participants to introduce themselves by providing:</p> <ul style="list-style-type: none">▪ Their name▪ The name of the CERT program they manage or will be managing▪ Their expectations for the CERT Program Manager course <p>Ask participants:</p> <p>What expectations do you have for this course?</p> <p>What do you hope to have learned by the time you leave this training?</p> <p>When all the responses are recorded, explain that you will review the list at the end of the training to see how well the expectations were met.</p>

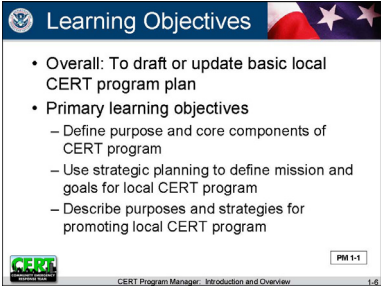
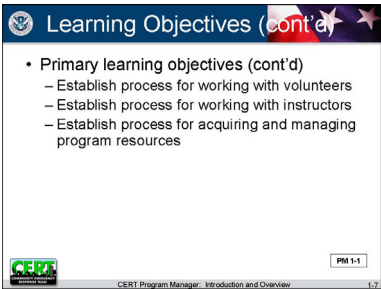
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Course Purpose</p> <ul style="list-style-type: none">• To prepare CERT Program Managers for the tasks required to establish and sustain an active local CERT program• Relevant for all Program Managers<ul style="list-style-type: none">– Those starting new program– Those building on existing program <p>Display Slide 1-5</p> <p>Briefly walk participants through the Participant Manual.</p> <p>Point out the box on the slide.</p> <p>Ask if there are any questions about the materials.</p>	<h3>Course Preview</h3> <h4>Course Purpose</h4> <p>Review the course purpose.</p> <ul style="list-style-type: none">▪ The purpose of the <i>CERT Program Manager</i> course is to prepare CERT Program Managers for the tasks required to establish and sustain an active local CERT program. <p>Explain that this course is relevant for everyone:</p> <ul style="list-style-type: none">▪ Those starting a new local program▪ Those building on an existing local program <p>Say that each person should leave with new ideas to help start a new program or to revitalize an ongoing program.</p> <h4>Course Materials</h4> <p>Refer participants to their Participant Manual.</p> <p>Explain that all the materials they will be using in the course are included in the Participant Manual.</p> <p>Say that the Participant Manual does not include copies of the slides.</p> <ul style="list-style-type: none">▪ All of the information on the slides is included in the text in the Participant Manual.▪ Each slide includes a reference in the bottom right corner showing the corresponding page number in the Participant Manual.

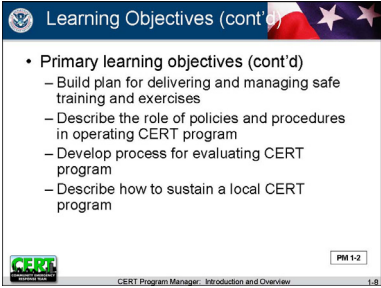
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Learning Objectives</p> <ul style="list-style-type: none">• Overall: To draft or update basic local CERT program plan• Primary learning objectives<ul style="list-style-type: none">– Define purpose and core components of CERT program– Use strategic planning to define mission and goals for local CERT program– Describe purposes and strategies for promoting local CERT program <p>Display Slide 1-6</p>  <p>Learning Objectives (cont'd)</p> <ul style="list-style-type: none">• Primary learning objectives (cont'd)<ul style="list-style-type: none">– Establish process for working with volunteers– Establish process for working with instructors– Establish process for acquiring and managing program resources <p>Display Slide 1-7</p>	<h3>Course Learning Objectives</h3> <p>Tell participants that an overall activity throughout this course will be to draft or update a basic local CERT program plan.</p> <p>Say that in addition there are 10 primary learning objectives for the <i>CERT Program Manager</i> course. These objectives describe what behaviors are expected from the participants by the conclusion of the <i>CERT Program Manager</i> course.</p> <p>At the conclusion of this training, participants will be able to:</p> <ol style="list-style-type: none">1. Define the purpose and core components of a local CERT program.2. Use strategic planning to define the mission and goals for a local CERT program.3. Describe the purposes and strategies for promoting a local CERT program.4. Establish a process for working with volunteers.5. Establish a process for working with instructors.6. Establish a process for acquiring and managing program resources.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-8 PM, P. 1-3 to 1-5</p> <p>The full list is also included on the following pages in the Instructor Guide and in the Participant Guide.</p>	<ol style="list-style-type: none">7. Build a plan for delivering and managing safe training and exercises.8. Describe the role of policies and procedures in operating a local CERT program.9. Develop a process for evaluating a local CERT program.10. Describe how to sustain a local CERT program. <p>Explain that the slide only shows the primary learning objectives.</p> <p>Say that each course objective has sub-objectives. They are included in the Participant Manual and can be reviewed in detail individually.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

PM, P. 1-3 to 1-5	Program Manager Course Learning Objectives
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At the conclusion of this training, participants will be able to:

1. Define the purpose and core components of a local CERT program.
2. Use strategic planning to define the mission and goals for a local CERT program.
 - a. Explain why a CERT program must have clearly defined goals and objectives.
 - b. Establish draft goals and objectives for a CERT program.
3. Describe the purposes and strategies for promoting a local CERT program.
 - a. Explain expected outcomes for program promotion.
 - b. Identify community organizations to target for partnership.
 - c. Identify strategies for developing and maintaining partnerships.
 - d. Explain how the process of goal setting is linked to program promotion.
 - e. Articulate CERT core messages to include in program promotion.
 - f. Identify techniques for promoting a program to various audiences.
4. Establish a process for working with volunteers.
 - a. Describe how to recruit volunteers.
 - b. Describe how to orient volunteers.
 - c. Explain why to track volunteers.
 - d. Describe methods for managing volunteers.
 - e. Identify techniques for retaining volunteers.
 - f. Identify strategies for terminating a volunteer.
5. Establish a process for working with instructors.
 - a. Describe how to recruit instructors.
 - b. Describe how to orient instructors.
 - c. Explain why to track instructors.
 - d. Describe methods for managing instructors.
 - e. Identify techniques for retaining instructors.
 - f. Explain what to do when terminating an instructor.

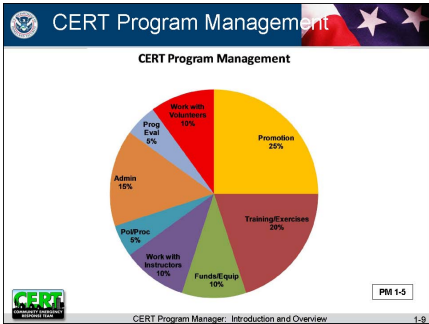
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

6. Establish a process for acquiring and managing program resources.
 - a. Identify types of resources needed to coordinate a CERT program.
 - b. Identify types of data that need to be collected and maintained for the program.
 - c. Develop strategies for locating and managing resources.
 - d. Identify program funding options and tips for approaching funders.
 - e. Develop a draft program budget.
7. Build a plan for delivering and managing safe training and exercises.
 - a. Identify training and exercises that are required or available for CERT volunteers.
 - b. Explain how to tailor content from *CERT Basic Training*.
 - c. Identify tasks required for managing CERT trainings.
 - d. Describe the elements of a CERT Training and Exercise Plan.
 - e. Explain how to ensure safety during training and exercises.
8. Describe the role of policies and procedures in operating a local CERT program.
 - a. Explain why policies and procedures are necessary for running a successful program.
 - b. Identify policies and procedures necessary for starting and maintaining a program.
 - c. Identify resources for developing program policies and procedures.
9. Develop a process for evaluating a local CERT program.
 - a. Explain what program evaluation is.
 - b. Describe the purpose of evaluating a program.
 - c. List the steps for evaluating various program components.
 - d. Identify the characteristics of a Program Report.
10. Describe how to sustain a local CERT program.
 - a. Describe the knowledge, skills, and abilities a Program Manager must possess in order to coordinate a program.
 - b. Identify elements necessary for sustaining a program.
 - c. Explain a technique for identifying program activities that contribute most significantly to program maintenance.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="155 352 581 674"></p> <p data-bbox="155 688 410 726">Display Slide 1-9</p> <p data-bbox="155 741 561 884">Emphasize the point about the <i>CERT Basic Training</i> percentage of time in the pie chart.</p>	<p data-bbox="610 359 1040 396">CERT Program Management</p> <p data-bbox="610 411 1386 663">Emphasize to participants that, as they can tell from the learning objectives, a local CERT program is much more than just conducting <i>CERT Basic Training</i>. Some experienced CERT Program Managers have estimated that in fact <i>CERT Basic Training</i> is only 20% of their work. The other key activities required for an active program will be reviewed in this course.</p> <p data-bbox="610 678 1382 789">Ask participants who are already Program Managers if the pie percentages are roughly consistent with their time spent in these activities.</p>
<p data-bbox="155 919 542 957">PM, Course Overview, P. 3</p>	<p data-bbox="610 919 883 963">Course Agenda</p> <p data-bbox="610 978 1344 1089">Refer participants to the <i>CERT Program Manager Course Agenda</i> in the Course Overview section and review it.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

PM, Course Overview, P. 3	CERT Program Manager Course Agenda
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Day 1

8:30 – 10:00 a.m.	Unit 1: Course Introduction, Overview, and Pre-Test
10:00 – 10:15 a.m.	<i>Break</i>
10:15 – 11:15 a.m.	Unit 2: Setting a Program Vision
11:15 – 11:30 a.m.	<i>Break</i>
11:30 a.m. – 12:30 pm.	Unit 2: Setting a Program Vision (cont'd)
	Lunch
1:30 – 2:30 p.m.	Unit 3: Promoting Your Program
2:30 – 2:45 p.m.	<i>Break</i>
2:45 – 3:45 p.m.	Unit 3: Promoting Your Program (cont'd)
3:45 – 4:00 p.m.	<i>Break</i>
4:00 – 5:00 p.m.	Unit 4: Working with Volunteers

Day 2

8:00 – 9:00 a.m.	Unit 4: Working with Volunteers (cont'd)
9:00 – 9:15 a.m.	<i>Break</i>
9:15 – 10:15 a.m.	Unit 5: Working with Instructors
10:15 – 10:30 a.m.	<i>Break</i>
10:30 – noon	Unit 6: Procuring and Managing Resources

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

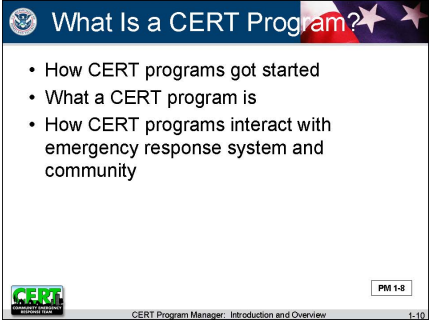
	Lunch
1:00 – 2:00 p.m.	Unit 7: Training and Exercises
2:00 – 2:15 p.m.	<i>Break</i>
2:15 – 3:15 p.m.	Unit 7: Training and Exercises (cont'd)
3:15 – 3:30 p.m.	<i>Break</i>
3:30 – 4:30 p.m.	Unit 8: Policies and Procedures

Day 3

8:00 – 9:00 a.m.	Unit 9: Program Evaluation
9:15 – 9:30 a.m.	<i>Break</i>
9:30 – 10:30 a.m.	Unit 10: Keeping Your Program Going
10:30 – 10:45 a.m.	<i>Break</i>
10:45 – noon	Unit 11: Course Summary and Conclusion

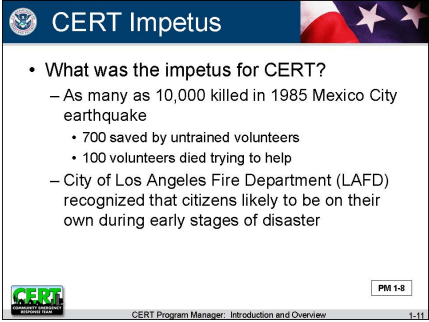
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-10</p> <p>Review what a CERT program is.</p> <p>If this course is being taught in conjunction with the <i>CERT Train-the-Trainer</i> course and the information in slides 1-11 to 1-20 has already been covered, review it quickly and move to slide 1-21.</p>	<h3><i>What Is a CERT Program?</i></h3> <p>Tell participants that, before getting into the details about how to manage a CERT program, everyone should have a clear picture of:</p> <ul style="list-style-type: none">▪ How CERT programs got started▪ What a CERT program is▪ How CERT programs interact with the emergency response system and the community

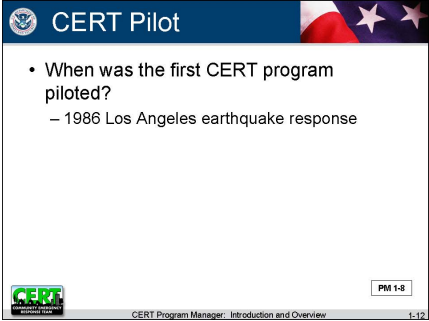
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>CERT Impetus</p> <ul style="list-style-type: none">• What was the impetus for CERT?<ul style="list-style-type: none">– As many as 10,000 killed in 1985 Mexico City earthquake<ul style="list-style-type: none">• 700 saved by untrained volunteers• 100 volunteers died trying to help– City of Los Angeles Fire Department (LAFD) recognized that citizens likely to be on their own during early stages of disaster <p>Display Slide 1-11</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>CERT Impetus</p> <p>Ask participants:</p> <p>What was the impetus for CERT?</p> <p>Summarize the discussion by reviewing the slide.</p> <ul style="list-style-type: none">▪ Maybe as many as 10,000 (estimates vary) were killed in the 1985 Mexico City earthquake; 700 people were saved by untrained volunteers, but 100 volunteers also died trying to help.▪ The City of Los Angeles Fire Department (LAFD) recognized that citizens would very likely be on their own during the early stages of a catastrophic disaster.

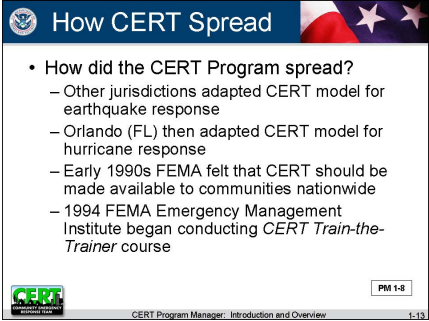
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-12</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>CERT Pilot</h3> <p>Ask participants:</p> <p>When was the first CERT program piloted?</p> <p>Give the answer to the question.</p> <p>The first CERT program was piloted in 1986 in Los Angeles for earthquake response.</p>

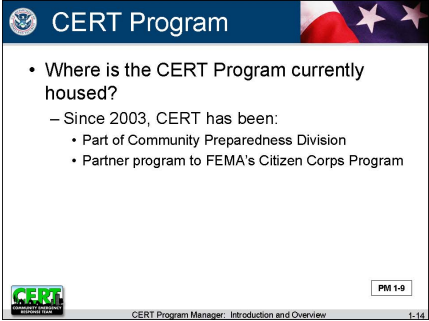
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>How CERT Spread</p> <ul style="list-style-type: none">• How did the CERT Program spread?<ul style="list-style-type: none">– Other jurisdictions adapted CERT model for earthquake response– Orlando (FL) then adapted CERT model for hurricane response– Early 1990s FEMA felt that CERT should be made available to communities nationwide– 1994 FEMA Emergency Management Institute began conducting <i>CERT Train-the-Trainer</i> course <p>Display Slide 1-13</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>How CERT Spread</h3> <p>Ask participants:</p> <h4>How did the CERT Program spread?</h4> <p>Summarize the discussion by reviewing the slide.</p> <ul style="list-style-type: none">▪ Other jurisdictions, including San Francisco, Portland (OR), and the State of Utah, adapted the CERT model for earthquake response in their communities. Orlando (FL) then adapted the CERT model for hurricane response, demonstrating the applicability of CERT to other hazards.▪ In the early 1990s, the Federal Emergency Management Agency (FEMA) felt that the concept and the program should be made available to communities nationwide as all-hazards training. <p>In 1994, the Emergency Management Institute (EMI) at FEMA began to conduct the <i>CERT Train-the-Trainer</i> course.</p>

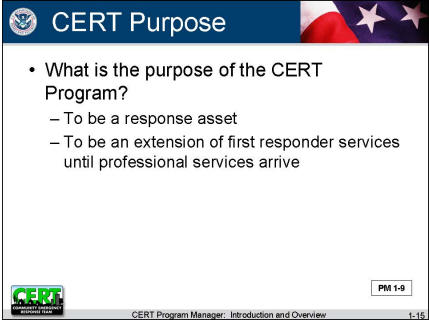
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-14</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>CERT Program</h3> <p>Ask participants:</p> <p>Where is the CERT Program currently housed?</p> <p>Give the answer to the question.</p> <p>Since 2003, the CERT Program has been part of the Individual and Community Preparedness Division and a partner program to the Citizen Corps Program at FEMA.</p>

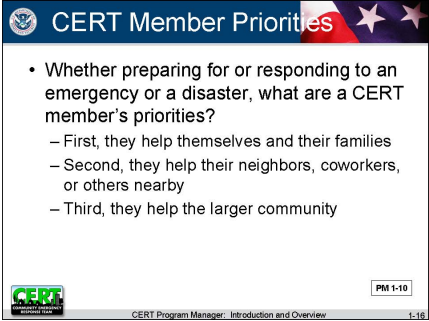
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-15</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question. Keep the discussion focused on the high-level purpose.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>CERT Purpose</h3> <p>Ask participants:</p> <h4>What is the purpose of the CERT Program?</h4> <p>Summarize the discussion by saying that, at its basic level, the purpose of the CERT Program is to train and organize community members:</p> <ul style="list-style-type: none">▪ To be a response asset in an emergency or disaster▪ To be an extension of first responder services until professional responders arrive <p>Explain that CERTs are organized to respond in different venues, for example:</p> <ul style="list-style-type: none">▪ Neighborhoods▪ Work places▪ High schools▪ College/university campuses▪ High-rise buildings▪ Rural areas <p>Note that some local CERT programs refer to multiple individual teams across their service area, while other programs refer to all of their participants as a single team.</p>

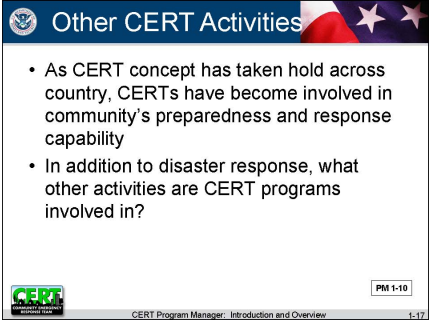
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 1-16</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>CERT Member Priorities</h3> <p>Ask participants:</p> <p>Whether preparing for or responding to an emergency or a disaster, what are a CERT member's priorities?</p> <p>Summarize the discussion by saying that CERT members always work within the limitations of their training.</p> <ul style="list-style-type: none">▪ First, they help themselves and their families.▪ Second, they help their neighbors, coworkers, or others nearby.▪ Third, they help the larger community. <p>Refer participants to CERT in Action! on the national CERT Web site to see stories about local CERT response in actual emergencies.</p> <p>(www.citizencorps.gov/cert/certinaction/index.shtm)</p>

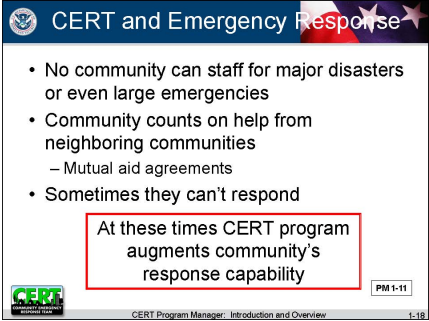
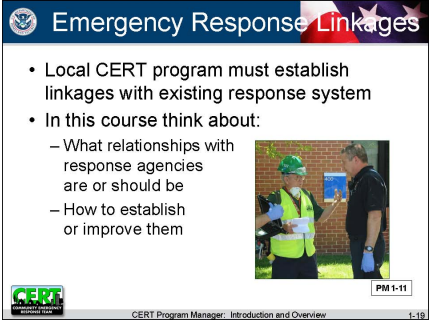

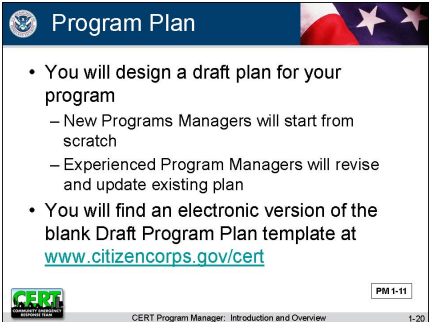
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>Other CERT Activities</p> <ul style="list-style-type: none">• As CERT concept has taken hold across country, CERTs have become involved in community's preparedness and response capability• In addition to disaster response, what other activities are CERT programs involved in? <p>Display Slide 1-17</p> <p>Conduct a class discussion by asking this question. Record activities on an easel pad or whiteboard. They will probably be quite specific:</p> <ul style="list-style-type: none">▪ Help at the county fair with traffic management▪ Make presentations on emergency preparedness at community meetings▪ Staff the first aid booth at home show▪ Install smoke detectors for low income households▪ Supplement fire tower staff during fire season▪ Assist EMS personnel with firefighter rehab <p>Review the list generated with the previous slide and point out which are:</p> <ul style="list-style-type: none">▪ Disaster response▪ Non-disaster emergency assistance▪ Other public safety activities	<h3>Other CERT Activities</h3> <p>Ask participants:</p> <p>As the CERT concept has taken hold across the country, CERTs have become involved in the community's preparedness and response capability.</p> <p>In addition to disaster response, what other activities are CERT programs involved in?</p> <p>Summarize the discussion by saying that, in addition to disaster response, CERTs are involved in a range of other volunteer services in their communities.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
 <p>CERT and Emergency Response</p> <ul style="list-style-type: none">• No community can staff for major disasters or even large emergencies• Community counts on help from neighboring communities<ul style="list-style-type: none">– Mutual aid agreements• Sometimes they can't respond <p>At these times CERT program augments community's response capability</p> <p>CERT Program Manager: Introduction and Overview 1-18</p>	<h3>CERT and the Emergency Response System</h3> <p>Finally, describe the relationship between the CERT program and the emergency response system.</p> <ul style="list-style-type: none">▪ No community can afford for its response agencies to staff for major disasters or even large emergencies.▪ A community counts on getting help from neighboring communities and it formalizes that understanding through mutual aid agreements.▪ But sometimes the neighboring communities are too busy taking care of themselves or there is damage to transportation routes, communication, or other critical infrastructure.▪ At these times the CERT program augments a community's response capability.
 <p>Emergency Response Linkages</p> <ul style="list-style-type: none">• Local CERT program must establish linkages with existing response system• In this course think about:<ul style="list-style-type: none">– What relationships with response agencies are or should be– How to establish or improve them  <p>CERT Program Manager: Introduction and Overview 1-19</p>	<p>Say that, in order to be effective, the local CERT program must establish linkages with the existing response system. Throughout this training participants should be thinking about what their relationships with response agencies are or should be and how to establish or improve them.</p>
 <p>Program Plan</p> <ul style="list-style-type: none">• You will design a draft plan for your program<ul style="list-style-type: none">– New Programs Managers will start from scratch– Experienced Program Managers will revise and update existing plan• You will find an electronic version of the blank Draft Program Plan template at www.citizen corps.gov/cert <p>CERT Program Manager: Introduction and Overview 1-20</p>	<h3>The Draft Program Plan</h3> <p>Explain that during the course participants will work on a Draft Program Plan that they design themselves. Developing this Draft Program Plan will not just be useful for new CERT Program Managers. It will also give experienced CERT Program Managers an opportunity to revisit decisions made previously and to revise and update them.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
PM, P. 1-10 to 1-31	<p>Refer participants to the <i>Draft Program Plan</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Emphasize that they will be working on the Draft Program Plan throughout the course.</p> <p>Add that there is an electronic version of the blank Draft Program Plan template with the other course materials at the national CERT Web site, www.citizencorps.gov/cert. If they want to revisit the Draft Program Plan that they'll build during the course, the electronic template can be used to incorporate additional ideas and details into their plan.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

PM, P. 1-10 to 1-31	CERT Draft Program Plan
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Unit 2. Program Goal and Objectives

Instructions:

1. New Program Managers: Draft an overall program goal and 1-2 objectives for your program. These would be a starting place for the discussion you will have with program sponsors and stakeholders.
2. Existing Program Managers: Enter your program's overall goal and two objectives. Ask yourself if the objectives are achievable and appropriate. If not, how might the objectives be revised?

Overall program goal:

Objectives (remember to make them SMART: simple, measurable, achievable, realistic, timely):

- 1.
- 2.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

People who should review the goal/objectives (include an individual's name, an agency/organization name, or both):

1.	7.
2.	8.
3.	9.
4.	10.
5.	11.
6.	12.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Unit 2. Program Partners

Instructions:

1. Existing Program Managers: Identify organizations that already provide important partnerships.
2. All Program Managers: Identify organizations in your community that could be targeted for partnership.

Current or Potential Partners

1.	
2.	
3.	
4.	
5.	
6.	
7.	
8.	
9.	
10.	

Unit 3. Promoting to Target Audiences

Instructions:

Complete the matrix with ideas for your CERT program.

Stakeholder/Partner	Promotional Message	Promotional Strategies

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Unit 4. Working with Volunteers

Recruitment

Instructions:

Complete the matrix with ideas for your CERT program. Do not include “word-of-mouth.”

I could try to recruit volunteers here.	I could use these elements in the recruitment message.
	Opening: Statement of need: Statement of solution: Why volunteer could do job: What’s in it for the volunteer:
	Opening: Statement of need: Statement of solution: Why volunteer could do job: What’s in it for the volunteer:

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

I could try to recruit volunteers here.	I could use these elements in the recruitment message.
	Opening: Statement of need: Statement of solution: Why volunteer could do job: What's in it for the volunteer:

Retention

Instructions:

Record ideas for retaining volunteers. Add to the list as you think of new ideas throughout the course.

Unit 5. Working with Instructors

Instructions:

Complete the matrix with ideas for your CERT program.

These are great instructors I use or would like to use.	
1.	2.
3.	4.
5.	6.

I could also look for instructors from these organizations.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Ideas I want to remember for orienting instructors

Ideas I want to remember for tracking instructors

Ideas I want to remember for managing instructors

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Ideas I want to remember for retaining instructors

Other

Unit 6. Procuring and Managing Resources

When procuring program resources, I need to think about these management issues:

Resources	Factors to Consider

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Some data collection and recordkeeping things I need to do:

Data or Records to Be Collected	Best Ways to Collect and Access Data/Records

Unit 7. Training and Exercises

My draft scenario for *CERT Basic Training*, Unit 5.

Some ideas for tailoring training to my community:

1.

2.

3.

4.

5.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Sample Training Schedule

Week 8 Before Training	Week 7 Before Training	Week 6 Before Training	Week 5 Before Training

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Week 4 Before Training	Week 3 Before Training	Week 2 Before Training	Week 1 Before Training

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Draft Training and Exercise Plan

Objective	Plan for Meeting Objective	Logistical Needs to Meet Objective	Risk to Members	Evaluation of Objective

Unit 8. Policies and Procedures

(Experienced Program Managers) Do your policies and procedures need to be revised? Consider these indicators:

- An increase in the number of injuries or ineffective team operations
- More questions on what are “normal operations” or a feeling of general confusion
- Requests from CERT members for more training on a particular procedure
- Inconsistent performance of CERT members
- Increase in the stress levels of CERT members
- Complaints about poor performance from the sponsoring agency, partners, or the community

Things I need to research and people I need to talk to before we develop (revise) policies and procedures:

Topic of Policy/Procedure	Research Needed	Individuals to Be Consulted

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Topic of Policy/Procedure	Research Needed	Individuals to Be Consulted

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Thoughts I had about the policies and procedures we need to develop (policies/procedures or elements that are specific to our program, e.g., how will our CERT members be activated?):

1.

2.

3.

4.

5.

6.

7.

8.

9.

10.

Unit 9. Program Evaluation

My specific goals and objectives for achieving them (remember to make objectives clear, concise, and measurable)

Goal #1.

Objective #1:

Objective #2:

Objective #3:

Goal #2.

Objective #1:

Objective #2:

Objective #3:

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Goal #3.

Objective #1:

Objective #2:

Objective #3:

Ideas for evaluating my Goal #__.

Unit 10. Keeping the Program Going

Three areas where I do well (three strengths):

1.

2.

3.

Three areas where I want additional training:

1.

2.

3.

Three areas I might want to delegate or share:

1.

2.

3.




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

Ideas for tasks/activities to add or redesign to make my program maintenance efforts most efficient:

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 1: INTRODUCTION AND OVERVIEW

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="159 359 581 401"> Unit Summary</p> <ul data-bbox="180 417 540 590" style="list-style-type: none">• Course preview<ul style="list-style-type: none">– Purpose and learning objectives• What is a CERT program?<ul style="list-style-type: none">– CERT history, purpose, and activities– CERT and the community– CERT and the emergency response system• The Draft Program Plan <p data-bbox="159 638 581 680"> PM 1-34 <small>CERT Program Manager: Introduction and Overview 1-21</small></p> <p data-bbox="159 695 423 730">Display Slide 1-21</p> <p data-bbox="159 768 233 842"></p>	<p data-bbox="610 359 865 401"><i>Unit Summary</i></p> <p data-bbox="610 422 1382 638">Say that in addition to covering the standard course introduction topics (course purpose and learning objectives), this unit provided an overview of what a CERT program is. Finally the unit introduced the Draft Program Plan that participants will work on during the course.</p> <p data-bbox="610 764 1393 835">Do you have any questions about anything covered in this unit?</p> <p data-bbox="610 919 764 955">Transition</p> <p data-bbox="610 974 1369 1083">The next unit will discuss setting goals for your CERT program and identifying roles the program can fulfill in your community.</p>

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UNIT 2: SETTING A PROGRAM VISION

In this unit you will learn about:

- **The Importance of Setting Goals.** Why you should set goals and objectives for your local program.
- **What Are Program Goals and Objectives.** The difference between goals and objectives.
- **The Goal Setting Process.** How to develop goals and objectives that are appropriate for your local program.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

LEARNING OBJECTIVES/ PERFORMANCE OUTCOMES	<p>At the conclusion of this unit, the participants will be able to:</p> <ul style="list-style-type: none">▪ Use strategic planning to define the mission and goals for a local CERT program.<ul style="list-style-type: none">• Explain why a CERT program must have clearly defined goals and objectives.• Establish draft goals and objectives for a CERT program.
SCOPE	<p>The topics that will be discussed in this unit are:</p> <ul style="list-style-type: none">▪ The Importance of Setting Goals▪ What Are Program Goals and Objectives?▪ The Goal Setting Process
ESTIMATED COMPLETION TIME	2 hours
TRAINING METHODS	<p>The instructor begins by discussing the importance of goal setting and explaining that successful programs have a clear vision of where they are headed.</p> <p>The instructor then leads a brainstorming session to list possible goals for a CERT program.</p> <p>Next the instructor explains the difference between an overall program goal and objectives. The instructor guides participants through the list previously developed to identify which are goals and which are objectives.</p> <p>The instructor will discuss the criteria that make an objective effective. It is SMART: simple, measurable, achievable, realistic, and timely. As a group, participants evaluate some examples of program objectives and determine whether they are effective.</p>

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**TRAINING
METHODS
(CONTINUED)**

The instructor discusses each of the five steps in the goal setting process:

1. Identify community needs and sponsor needs.
2. Develop draft goal and objectives.
3. Test the goals and objectives with sponsors and stakeholders.
4. Periodically evaluate progress toward achieving objectives and appropriateness of objectives.
5. Develop new goal/objectives as needed.

Between Steps 3 and 4, participants begin to work on their Draft Program Plan, introduced in Unit 1, by developing draft goal and objectives for their program.

New Program Managers will identify a draft overall goal and 1-2 draft objectives for their program. They will list people that they want to involve in the goal development process.

Established Program Managers will review their current program goal and objectives and see if the objectives are achievable and appropriate and how the objectives might be revised. They will list others who should review the updated goals.

In Step 4, Periodically Evaluate Progress, two tools are discussed to use for strategic planning: Questions to Get You Started and SWOT Analysis.

**RESOURCES
REQUIRED**

- *Community Emergency Response Team Program Manager Instructor Guide (for instructors)*
- *Community Emergency Response Team Program Manager Participant Manual (for participants)*
- PowerPoint slides 2-1 to 2-27

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EQUIPMENT The following additional equipment is required for this unit:

- A computer with PowerPoint software
- A computer projector and screen
- Easel pad and easel or whiteboard
- Markers

NOTES A suggested time plan for this unit is as follows:

Unit Overview 5 minutes

The Importance of Setting Goals..... 5 minutes

What Are Program Goals and Objectives 20 minutes

The Goal Setting Process 60 minutes

Draft Program Plan: Develop Program Goal and Objectives
..... 25 minutes

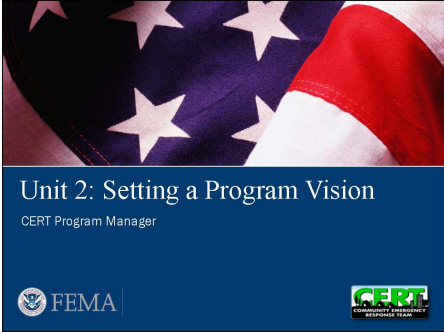
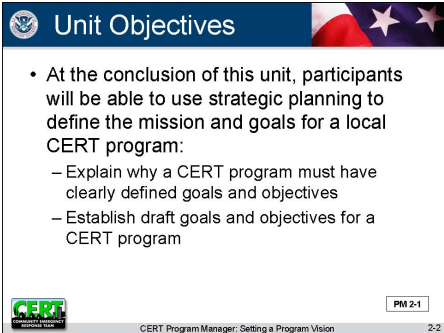
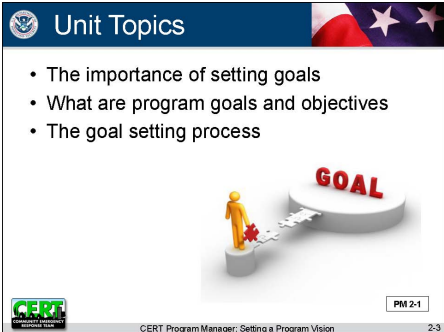
Unit Summary 5 minutes

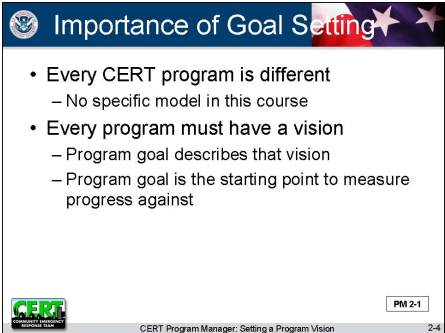
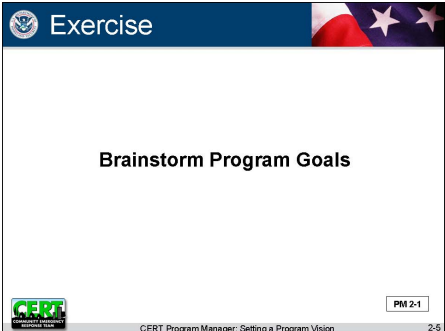
Total Time: 2 hours


REMARKS When talking about goals, terminology often gets murky. The literature on strategic planning uses a variety of terms: plans, policies, mission statements, goals, objectives, strategies, tactics, and actions.

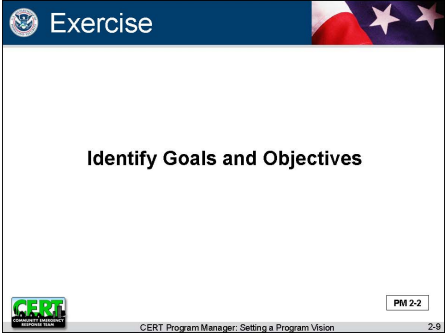
For this unit, the terms goal and objectives are used.

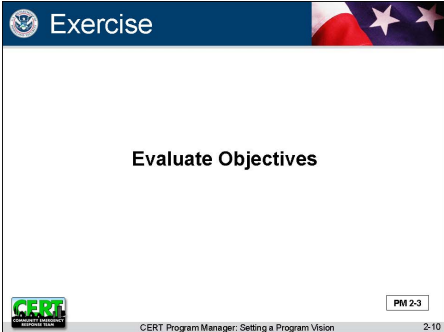
Unit 2: Setting a Program Vision

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="180 520 620 850">  <p>Unit 2: Setting a Program Vision CERT Program Manager</p> <p>FEMA CERT</p> </div> <p data-bbox="180 867 431 905">Display Slide 2-1</p> <div data-bbox="180 932 620 1262">  <p>Unit Objectives</p> <ul style="list-style-type: none"> At the conclusion of this unit, participants will be able to use strategic planning to define the mission and goals for a local CERT program: <ul style="list-style-type: none"> Explain why a CERT program must have clearly defined goals and objectives Establish draft goals and objectives for a CERT program <p>FEMA CERT PM 2-1</p> </div> <p data-bbox="180 1278 435 1316">Display Slide 2-2</p> <div data-bbox="180 1409 620 1738">  <p>Unit Topics</p> <ul style="list-style-type: none"> The importance of setting goals What are program goals and objectives The goal setting process <p>FEMA CERT PM 2-1</p> </div> <p data-bbox="180 1755 435 1793">Display Slide 2-3</p>	<p data-bbox="646 527 899 564">Unit Overview</p> <p data-bbox="646 581 1429 653">Say that this unit looks at program goals and objectives and how they are developed.</p> <p data-bbox="646 936 878 974">Unit Objectives</p> <p data-bbox="646 991 1130 1026">Give the unit’s learning objectives.</p> <p data-bbox="646 1043 1446 1148">At the conclusion of this unit, the participants will be able to use strategic planning to define the mission and goals for a local CERT program:</p> <ul data-bbox="646 1165 1373 1329" style="list-style-type: none"> Explain why a CERT program must have clearly defined goals and objectives. Establish draft goals and objectives for a CERT program. <p data-bbox="646 1413 821 1451">Unit Topics</p> <p data-bbox="646 1467 1396 1539">Say that, to accomplish those objectives, this unit will look at:</p> <ul data-bbox="646 1556 1260 1696" style="list-style-type: none"> The importance of setting goals What are program goals and objectives The goal setting process

INSTRUCTOR GUIDANCE	CONTENT
 <p>Importance of Goal Setting</p> <ul style="list-style-type: none"> • Every CERT program is different <ul style="list-style-type: none"> – No specific model in this course • Every program must have a vision <ul style="list-style-type: none"> – Program goal describes that vision – Program goal is the starting point to measure progress against <p>CERT COMMUNITY EMERGENCY RESPONSE TEAM</p> <p>CERT Program Manager: Setting a Program Vision PM 2-1 2-4</p> <p>Display Slide 2-4</p>  <p>Exercise</p> <p>Brainstorm Program Goals</p> <p>CERT COMMUNITY EMERGENCY RESPONSE TEAM</p> <p>CERT Program Manager: Setting a Program Vision PM 2-1 2-5</p> <p>Display Slide 2-5</p>	<p><i>The Importance of Setting Goals</i></p> <p>Tell participants that an effective CERT program will look very different from one community to another. Therefore, this course will not provide a specific model for operating a program.</p> <p>Say that, even though this course will not provide a model, in order to choose an operating structure, every CERT program must have a clear vision of what that CERT program will be.</p> <p>Explain that the way that we describe our program vision is by creating a goal for the program. We have to have that goal as a starting point so we can later determine whether we have made any progress.</p> <p>Exercise: Brainstorm Program Goals</p> <p>Purpose: This exercise generates a list of possible program goals.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Ask participants: What might be a possible goal for a CERT program? 2. Record the list on the easel pad. 3. If there is more than one page of ideas, post the pages because you will return to the list.

INSTRUCTOR GUIDANCE	CONTENT
<p>Goals and Objectives</p> <ul style="list-style-type: none"> • Every program needs goal and objectives <ul style="list-style-type: none"> – Goal = program purpose – Objectives = specific activities to accomplish goal  <p><small>CERT Program Manager: Setting a Program Vision 2-6</small></p>	<p><i>What Are Program Goals and Objectives?</i></p> <p>Make the distinction between a goal and an objective.</p> <ul style="list-style-type: none"> ▪ The program goal is a clear and succinct statement about the program’s purpose for existence. ▪ Objectives are specific activities that the program will undertake to accomplish the goal.
<p>Display Slide 2-6</p> <p>Program Goal</p> <ul style="list-style-type: none"> • Also called mission statement • Clear and succinct statement about program’s purpose for existence • What you will provide to whom and where <p>“The Anywhere CERT Program will assume management of disaster relief operations in the neighborhoods of CERT members until professional responders arrive.”</p> <p><small>CERT Program Manager: Setting a Program Vision 2-7</small></p>	<p>Provide these details about program goals.</p> <ul style="list-style-type: none"> ▪ Sometimes a goal is called a mission statement. ▪ It will probably describe what you will provide to whom and in what geographic area. ▪ Example: “The Anywhere CERT Program will assume management of disaster relief operations in the neighborhoods of CERT members until professional responders arrive.”
<p>Display Slide 2-7</p> <p>Program Objective</p> <ul style="list-style-type: none"> • Describes what you will do to accomplish goal • Effective objectives are SMART <ul style="list-style-type: none"> –Simple –Measurable –Achievable –Realistic –Timely <p>“Provide two <i>CERT Basic Training</i> courses each calendar year.”</p> <p><small>CERT Program Manager: Setting a Program Vision 2-8</small></p>	<ul style="list-style-type: none"> ▪ Example: “To do the greatest good for the most people in the least amount of time” (CERT Program) <p>Explain that objectives describe your intended future results – specific things that you will accomplish.</p>
<p>Display Slide 2-8</p>	

INSTRUCTOR GUIDANCE	CONTENT
<p>The objective does meet the SMART criteria.</p>  <p>Display Slide 2-9</p>	<p>Say that to be effective an objective must be SMART.</p> <ul style="list-style-type: none"> ▪ Simple (or specific): It is clear and well-defined ▪ Measurable: There is a way to measure progress toward achieving that goal. ▪ Achievable: The resources available to accomplish the objective. ▪ Realistic: The goal can be accomplished within reasonable parameters (e.g., time, cost, resource expenditure). ▪ Timely: The objective includes a due date or a time when it will be accomplished. <p>Ask participants if the objective on the slide is SMART.</p> <p>Exercise: Identify Goals and Objectives</p> <p>Purpose: This exercise allows participants to practice distinguishing between program goals and program objectives.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Say to participants: Let’s look at the list we just created. Which goals are goals, and which are objectives? 2. Mark goals with a “G” and objectives with an “O.”

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 2-10</p> <p>PM, P. 2-4 to 2-7</p> <p>The correct responses are provided in the Instructor Guide.</p>	<p>Exercise: Evaluate Objectives</p> <p>Purpose: This exercise allows participants to identify effective objectives.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Say to participants: Let’s look at some objectives and evaluate them to see if they are effective. 2. Refer participants to <i>Examples of Program Objectives</i> in the Participant Manual and on the following page in the Instructor Guide. 3. Ask participants to complete the worksheet individually. 4. Explain that for each objective, participants should answer Yes or No to the questions by checking the appropriate box. <ol style="list-style-type: none"> a. Is the objective simple? b. Is the objective measurable? c. Is the objective achievable? d. Is the objective realistic? e. Is the objective timely? 5. Review the worksheet with participants. Discuss their responses. 6. After reviewing all seven examples, ask participants which objectives are effective. The correct answers are 4 and 7.

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INSTRUCTOR GUIDANCE	CONTENT
	<p><u>Debrief:</u> Remind participants that to be effective an objective must meet all five criteria: smart, measurable, achievable, realistic, and timely.</p>

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PM, P. 2-4 to 2-7	Examples of Program Objectives
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Instructions:

For each goal answer Yes or No to the questions by checking the appropriate box.

1. To have enough instructors available so that whenever a group of 15 or more people is interested in having a CERT class we can provide it for them

	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Simple, measurable, achievable, realistic

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2. To improve community preparedness by training community volunteers to provide emergency care until first responders arrive

	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Measurable, achievable, realistic

3. To see Teen CERT in every high school in our county

	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Simple, measurable, achievable

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4. To support a community's public safety efforts (e.g., installing smoke alarms or staffing first aid booths at community events) by providing CERT members whenever requested

	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Simple, measurable, achievable, realistic (depending on a CERT program's resources), timely

5. To locate a cadre of experts that will assist in providing *CERT Basic Training* to all 170,000 county residents and to do annual refresher training

	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Measurable, achievable

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6. To assist and support the work of the Office of Emergency Management



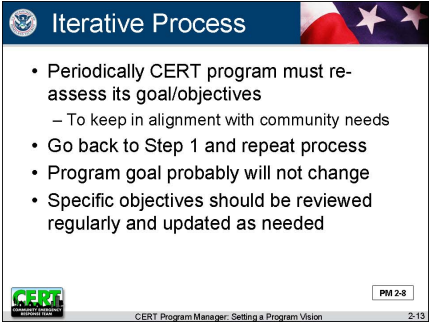
	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Achievable, realistic

7. To host an outdoor search and rescue class and then to form a search and rescue team

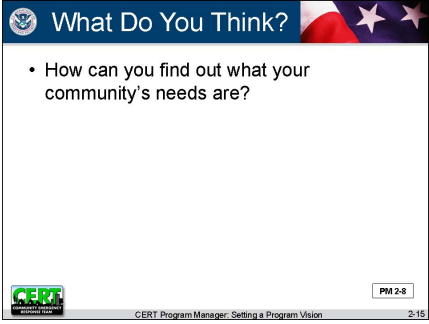
	Yes	No
Is the objective simple?		
Is the objective measurable?		
Is the objective achievable?		
Is the objective realistic?		
Is the objective timely?		

Answer: Simple, measurable, achievable, realistic, timely

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 2-11</p>	<p>The Goal Setting Process</p> <p>Say that now participants understand what a goal is and what a goal must include to be effective. The next thing to talk about is how to set program goals.</p>
 <p>Display Slide 2-12</p>	<p>The Five Steps in the Goal Setting Process</p> <p>Describe the five steps in the goal setting process:</p> <ol style="list-style-type: none"> 1. Identify community needs and sponsor needs 2. Develop draft goal and objectives 3. Test the goal and objectives with sponsors and stakeholders 4. Periodically evaluate: <ol style="list-style-type: none"> a. Progress toward achieving objectives b. Appropriateness of objectives 5. Develop new goal and objectives as needed
 <p>Display Slide 2-13</p>	<p>Explain that this slide is an overview and each step will be covered in more detail.</p> <p>Explain that this is an iterative process. Periodically the CERT program must re-assess its goals to ensure that they are kept in alignment with the needs of the community. That means going back to Step 1 and repeating the goal setting process. The overall program goal probably will not change, but specific goals should be reviewed regularly and updated as needed.</p>

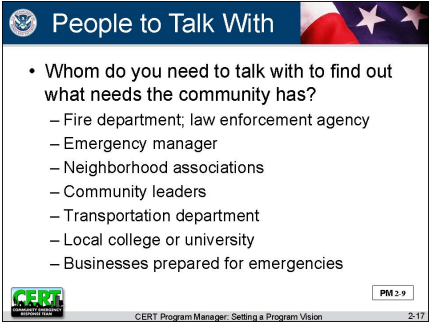
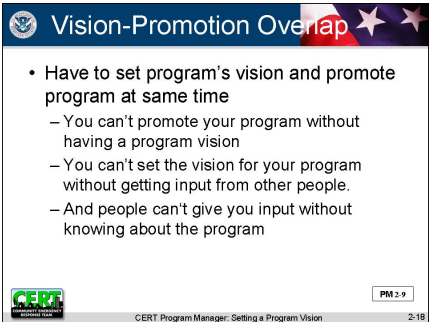
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INSTRUCTOR GUIDANCE	CONTENT
 <p>#1: Identify Needs</p> <ul style="list-style-type: none">• All program goal/objectives are local• Program goal/objectives must be developed by local program<ul style="list-style-type: none">– This is entity that will be implementing them• Program goal/objectives must respond to needs of community <p>CERT Program Manager: Setting a Program Vision 2-14</p>	<h3>Step #1: Identify Community Needs and Potential Sponsor Needs</h3> <p>Explain that all program goal and objectives are local.</p> <ul style="list-style-type: none">▪ They must be developed by the local program as this is the entity that will be implementing them.▪ They must respond to the needs of the community.
<p>Display Slide 2-14</p>  <p>What Do You Think?</p> <ul style="list-style-type: none">• How can you find out what your community's needs are? <p>CERT Program Manager: Setting a Program Vision 2-15</p>	<p>Ask participants:</p> <h3>How can you find out what your community's needs are?</h3>
<p>Display Slide 2-15</p> <p>The answer is very simple: You ask.</p>  <p>Community Needs</p> <ul style="list-style-type: none">• When you ask about your community's needs, what do you want to find out?<ul style="list-style-type: none">– What hazards are possible in community?– What is emergency management system in community? Who are players?– Have there been other community-based public safety efforts? How successful?– Have some homeowners and businesses implemented preparedness measures?– What support is there for CERT? <p>CERT Program Manager: Setting a Program Vision 2-16</p>	<p>Ask participants:</p> <h3>When you ask about your community's needs, what do you want to find out?</h3> <p>Summarize the discussion by reviewing some of the things you want to find out:</p> <ul style="list-style-type: none">▪ What hazards are possible in the community?▪ What is the emergency management system (EMS) in the community and who are the players?▪ Have there been other community-based public safety efforts? How successful were they?▪ Have some homeowners and businesses implemented preparedness measures?▪ What support is there for CERT?
<p>Display Slide 2-16</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p>	

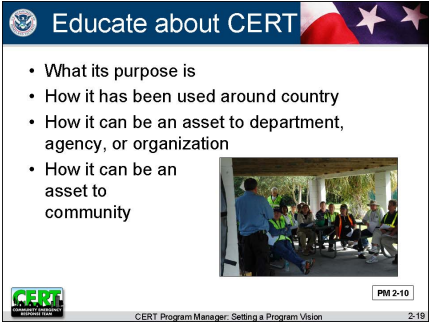

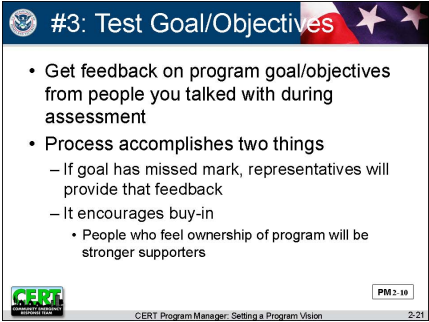
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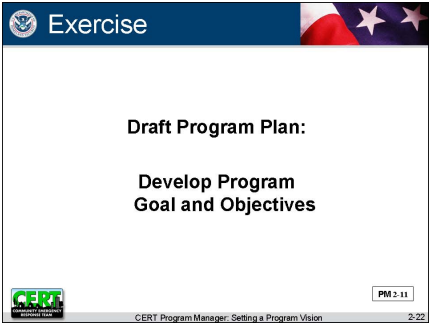
UNIT 2: SETTING A PROGRAM VISION

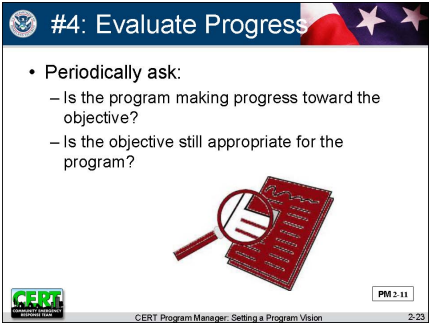
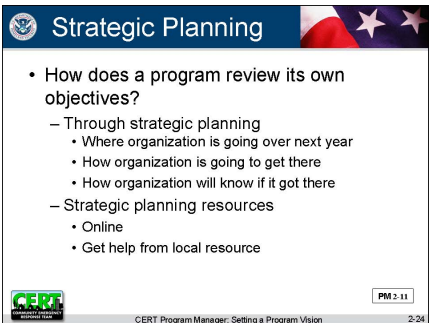
INSTRUCTOR GUIDANCE	CONTENT
<p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>  <p>Display Slide 2-17</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>  <p>Display Slide 2-18</p>	<p>Ask participants:</p> <p>Whom do you need to talk with to find out what needs the community has?</p> <p>Summarize the discussion by reviewing a partial list of people you want to talk to:</p> <ul style="list-style-type: none">▪ Fire department▪ Law enforcement agency▪ Emergency manager▪ Neighborhood associations▪ Community leaders▪ Transportation department▪ Local college or university▪ Businesses who have prepared for emergencies, either voluntarily or because they are required by law <p>Say that there is an overlap between setting your program's vision and promoting your program (Unit 3). They really have to be done together.</p> <ul style="list-style-type: none">▪ You can't promote your program without having a program vision.▪ You can't set the vision for your program without getting input from other people.▪ And people can't give you input without knowing about the program.

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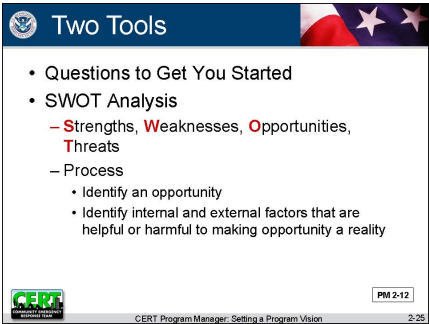
INSTRUCTOR GUIDANCE	CONTENT
 <p>Educate about CERT</p> <ul style="list-style-type: none">• What its purpose is• How it has been used around country• How it can be an asset to department, agency, or organization• How it can be an asset to community <p>Display Slide 2-19</p>	<p>Explain that therefore, when you talk with people to assess your community's needs, you should also be prepared to educate them about the CERT Program:</p> <ul style="list-style-type: none">▪ What its purpose is▪ How it has been used around the country▪ How it can be an asset to their department, agency, or organization▪ How it can be an asset to your community
 <p>#2: Develop Draft Goals</p> <ul style="list-style-type: none">• One overall program goal• Several objectives<ul style="list-style-type: none">– Program decides how many to develop <p>Start Small!</p> <p>Display Slide 2-20</p>	<p>Step #2: Develop Draft Goal/Objectives</p> <p>Tell participants that, once they have assessed the community's needs, the program organizers will have gotten some direction for developing draft goal/objectives.</p> <p>Explain that the number of objectives to be developed will be determined by the program. However, new programs should make sure that the startup phase is manageable. Start small!</p>
 <p>#3: Test Goal/Objectives</p> <ul style="list-style-type: none">• Get feedback on program goal/objectives from people you talked with during assessment• Process accomplishes two things<ul style="list-style-type: none">– If goal has missed mark, representatives will provide that feedback– It encourages buy-in<ul style="list-style-type: none">• People who feel ownership of program will be stronger supporters <p>Display Slide 2-21</p>	<p>Step #3: Test Goal and Objectives with Sponsors and Stakeholders</p> <p>Say that the program organizers should return to the representatives they talked with earlier and get feedback on the program goal and objectives. This process accomplishes two things:</p> <ul style="list-style-type: none">▪ If a goal has missed the mark, the representatives will provide that feedback.▪ It encourages buy-in. People who feel some ownership of the program will be stronger program supporters.

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 2-22</p>	<p>Exercise: Draft Program Plan: Develop Program Goal and Objectives</p> <p>Purpose: New Program Managers will draft a program goal and 1-2 objectives for their program. They will list people that they want to ask to review the draft goal and objectives.</p> <p>Established Program Managers will review their current program goal and objectives to see if the objectives are achievable and appropriate and how they might be revised. They will list others who should review the updated goal and objectives</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. 2. Ask participants to complete the first section, <i>Program Goals and Objectives</i>, individually. <p>Debrief: Discuss the exercise with participants.</p> <p>(New Program Managers) Was it easy to come up with a goal and objectives?</p> <p>(Experienced Program Managers) Do you want to revise your current goal and objectives?</p> <p>(All) Do you think you have identified the right people to be involved in your goal and objectives development? Why? Ask for some examples of the people participants have identified.</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="180 354 605 674">  <p>#4: Evaluate Progress</p> <ul style="list-style-type: none"> Periodically ask: <ul style="list-style-type: none"> Is the program making progress toward the objective? Is the objective still appropriate for the program? </div> <p>Display Slide 2-23</p> <div data-bbox="180 753 605 1073">  <p>Strategic Planning</p> <ul style="list-style-type: none"> How does a program review its own objectives? <ul style="list-style-type: none"> Through strategic planning <ul style="list-style-type: none"> Where organization is going over next year How organization is going to get there How organization will know if it got there Strategic planning resources <ul style="list-style-type: none"> Online Get help from local resource </div> <p>Display Slide 2-24</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Step #4: Periodically Evaluate Progress</p> <p>Explain that a CERT program does not set an objective once, put it in a drawer, and forget about it. Program objectives reflect and define the program. Therefore they periodically must be evaluated.</p> <p>Say that the CERT program wants to find out:</p> <ul style="list-style-type: none"> Is the program making progress toward the objective? Is the objective still appropriate for the program? <p>Ask participants:</p> <p>How does a program review its own objectives?</p> <p>Summarize the discussion by explaining that reviewing a program’s objectives is often part of the process known as “strategic planning.” Strategic planning determines:</p> <ul style="list-style-type: none"> Where an organization is going over the next year How the organization is going to get there How the organization will know if it got there <p>Explain that strategic planning is not very complicated, but it is also not a skill that most Program Managers have. However, there are lots of resources available:</p> <ul style="list-style-type: none"> There is a great deal of information online. This course will offer a few tools for strategic planning. Program Managers should also consider finding a strategic planner to assist the CERT program. Some sources might be: <ul style="list-style-type: none"> A community college A local volunteer clearinghouse Someone who works for one of the sponsors

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 2-25</p> <p>PM, P. 2-13 and 2-14</p> <p>Refer participants to the tools on the next two pages. The questions are self-explanatory. Quickly walk through the SWOT Analysis template.</p> <p>If you have time, practice using the SWOT Analysis. Ask the class to volunteer an opportunity a CERT program might consider. Then brainstorm strengths, weaknesses, opportunities, and threats.</p>	<p>Describe two tools that a CERT program could use for strategic planning:</p> <ol style="list-style-type: none">1. Questions to Get You Started<ol style="list-style-type: none">a. This series of questions developed by the National CERT Program will help a CERT program determine its community's strengths and challenges and its implementation strategy.b. This list is in the Participant Manual and on the following page in the Instructor Guide.2. SWOT Analysis<ol style="list-style-type: none">a. SWOT stands for strengths, weaknesses, opportunities, and threats.b. SWOT Analysis is a strategic planning method used to evaluate the strengths, weaknesses, opportunities, and threats involved in an opportunity.c. In SWOT Analysis you specify an opportunity and identify the internal and external factors that are helpful or harmful to making the opportunity a reality.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

PM, P. 2-13 and 2-14	Questions to Get You Started
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Take a few minutes to review the questions below. Answering these questions will help you determine your community's strengths and challenges and your strategy for implementing the CERT program.

Category	Questions
Baseline of Community Awareness	<ul style="list-style-type: none">• How would you assess the community's awareness of risk?• Have there been community-based public safety efforts?• Have some homeowners and businesses implemented preparedness measures?
Industry and Business	<ul style="list-style-type: none">• What businesses have a history of actively preparing for emergencies?• What businesses are required by law to maintain response plans?• What businesses are the most influential employers in your community?• Which businesses have a corporate culture that encourages volunteerism?• What are the prominent business organizations or associations in your community?
Media	<ul style="list-style-type: none">• Which of the television, radio, or print media in your community are more community-service oriented?• Are there journalists or reporters who have prepared stories on natural hazards, emergency preparedness, or emergency response exercises?• Which local media outlets have the greatest potential to be effective partners?• Can you encourage the favorite local weather forecaster to be an active participant?

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

Health Care Providers

- Which health care providers are most active in promoting public safety?
- Can you encourage medical professionals to participate actively to promote preparedness?

Community Leaders

- Which community leaders might champion this initiative?
- Which community organizations are typically active in community initiatives or events?
- Can you get explicit support from local public officials?

Educational Institutions

- Have any educational institutions participated in any type of natural hazard preparedness or response activities?
- Are there any existing initiatives at area colleges and universities that would make a natural partner with CERT (e.g., programs in emergency planning or public education)?
- Does the local school district require its students to perform community service?

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

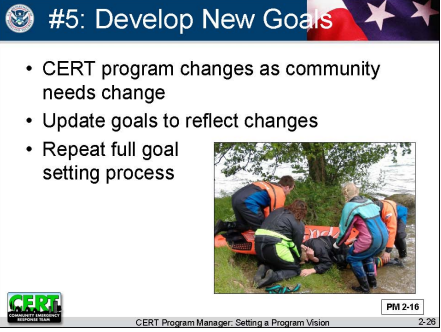
PM, P. 2-15	SWOT Analysis Template
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Opportunity that you are evaluating: _____

	Helpful	Harmful
Internal	<p>Strengths</p> <p>Positive internal factors within your control. Things you could build on.</p>	<p>Weaknesses</p> <p>Negative internal factors within your control. Things you should restrict or improve.</p>
	<p>Opportunities</p> <p>Positive external factors outside your control. Things you could build on.</p>	<p>Threats</p> <p>Negative external factors outside your control. Things you should try to minimize.</p>



COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

INSTRUCTOR GUIDANCE	CONTENT
 <p>#5: Develop New Goals</p> <ul style="list-style-type: none">• CERT program changes as community needs change• Update goals to reflect changes• Repeat full goal setting process <p>Display Slide 2-26</p>	<p>Step #5: Develop New Goal and Objectives as Needed</p> <p>Tell participants that the final step in the goal setting process is to develop new goal/objectives as needed. The CERT program will change over time as the community's needs change. The program must update its goals to reflect those changes.</p> <p>Remind participants to follow the goal setting process even though it may be tempting to skip on it.</p> <ul style="list-style-type: none">▪ Assess the community's needs and the sponsor's needs.▪ Test draft goal and objectives with the sponsors and stakeholders.▪ Periodically evaluate progress.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 2: SETTING A PROGRAM VISION

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="240 359 675 401"> Unit Summary</p> <ul data-bbox="264 415 634 541" style="list-style-type: none">• Goals important to all programs, ongoing and new<ul style="list-style-type: none">– Overall program goal– Specific objectives• Use 5-step goal setting process <p data-bbox="240 646 675 688"> <small>CERT Program Manager: Setting a Program Vision</small> <small>PM 2-16</small> <small>2-27</small></p> <p data-bbox="240 701 506 737">Display Slide 2-27</p> <p data-bbox="240 961 315 1031"></p>	<p data-bbox="708 359 959 401">Unit Summary</p> <p data-bbox="708 415 1507 632">Tell participants that they should understand by now that a CERT program is not developed in isolation. If the program is going to be successful, it has to prove that it will be a resource for the community. To be a resource for the community the program must know where it is going and how it is going to get there.</p> <p data-bbox="708 653 1507 869">Say that goals and objectives are the tools we use to lay out the program’s future. They are an important aspect of managing existing programs as well beginning new programs. Programs must develop an overall program goal and several objectives using the goal setting process.</p> <p data-bbox="708 953 1487 1024">Do you have any questions about anything covered in this unit?</p> <p data-bbox="708 1115 862 1150">Transition</p> <p data-bbox="708 1163 1487 1276">The remainder of the course will focus on strategies for reaching and evaluating your program goal and objectives.</p> <p data-bbox="708 1289 1463 1360">The next unit will discuss the importance of program promotion and how to promote to different audiences.</p>

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UNIT 3: PROMOTING YOUR PROGRAM

In this unit you will learn about:

- **Why We Promote and to Whom We Promote.** The reasons for promoting your program and the different audiences for promotion.
- **The Importance of Partnerships.** Why partnerships are important and possible partners.
- **Program Promotion and Goal Setting.** How program promotion and goal setting tie together.
- **How to Initiate and Foster Partnerships.** The process for developing and maintaining key partnerships.
- **The Promotional Message.** CERT core values to include in promotional messages and how to promote a program to various audiences.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

- Describe the purposes and strategies for promoting a local CERT program.
 - Explain expected outcomes for program promotion.
 - Identify community organizations to target for partnership.
 - Identify strategies for developing and maintaining partnerships.
 - Explain how the process of goal setting is linked to program promotion.
 - Articulate CERT core messages to include in program promotion.
 - Identify techniques for promoting a program to various audiences.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- Why We Promote and to Whom We Promote
- The Importance of Partnerships
- Program Promotion and Goal Setting
- How to Initiate and Foster Partnerships
- The Promotional Message
- Unit Summary

**ESTIMATED
COMPLETION
TIME**

2 hours

**TRAINING
METHODS**

The instructor conducts a guided discussion about the various reasons for promoting a program and the benefits the CERT program could have for key stakeholders and the community.

Next the instructor emphasizes the importance of partnerships in starting and sustaining a CERT program. Through a series of questions and guided discussions, the instructor and participants identify:

1. Possible CERT program partners
2. What these partnerships would bring to the CERT program

Following this, participants identify organizations in their community that could be targeted for partnership and record them in the Draft Program Plan.

Then the instructor explains the relationship between goal setting and program partners and how some partners are involved in goal setting and some are not.

Following this, participants identify whether the potential partners they recorded in the Draft Program Plan should be involved in goal setting.

Next the instructor discusses each of the five steps in the process for initiating and fostering partnerships:

1. Create a program description
2. Develop a plan for approaching each partner
3. Schedule one-on-one meetings
4. Maintain contact
5. Constantly be alert for new partners

Then the instructor leads a guided discussion on the key messages and values of the CERT program. Participants work in small groups to strategize techniques for promoting CERT messages to five different target audiences.

Finally, participants complete a matrix in the Draft Program Plan, identifying three of the program's partners, what messages to use with them, and strategies for communicating the messages.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

**RESOURCES
REQUIRED**

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
- *Community Emergency Response Team Program Manager Participant Manual* (for participants)
- PowerPoint slides 3-1 to 3-34

EQUIPMENT

The following additional equipment is required for this unit:


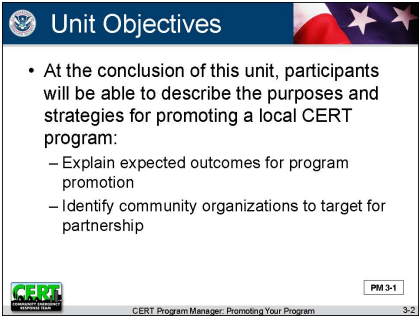
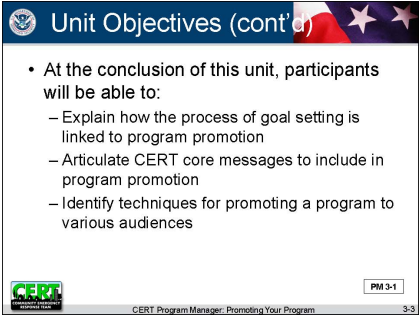
- A computer with PowerPoint software
- A computer projector and screen
- Easel pad and easel or whiteboard
- Markers

NOTES

A suggested time plan for this unit is as follows:

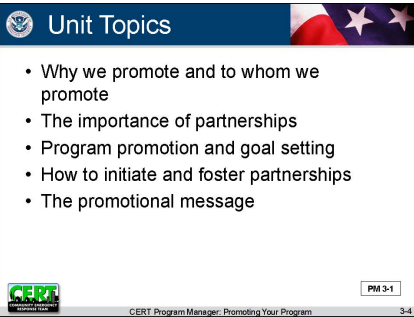


Unit Overview	1 minute
Why We Promote and to Whom We Promote	10 minutes
The Importance of Partnerships	13 minutes
Draft Program Plan: Identify Potential Partners.....	5 minutes
Program Promotion and Goal Setting	15 minutes
Draft Program Plan: Program Partners and Goal-Setting ...	5 minutes
How to Initiate and Foster Partnerships	45 minutes
The Promotional Message	20 minutes
Draft Program Plan: Promoting to Target Audiences	5 minutes
Unit Summary	1 minute
Total Time:	2 hours

Unit 3: Promoting Your Program

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 3-1</p>  <p>Display Slide 3-2</p>  <p>Display Slide 3-3</p>	<p>Unit Overview</p> <p>Say that this unit looks at the reasons and strategies for promoting a CERT program.</p> <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to describe the purposes and strategies for promoting a local CERT program:</p> <ul style="list-style-type: none"> ▪ Explain expected outcomes for program promotion. ▪ Identify community organizations to target for partnership. ▪ Identify strategies for developing and maintaining partnerships. ▪ Explain how the process of goal setting is linked to program promotion. ▪ Articulate CERT core messages to include in program promotion. ▪ Identify techniques for promoting a program to various audiences.

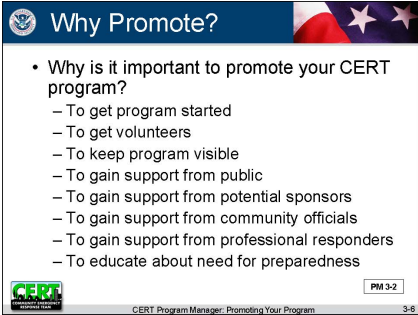
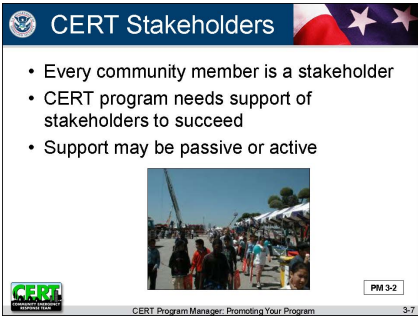

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• Why we promote and to whom we promote• The importance of partnerships• Program promotion and goal setting• How to initiate and foster partnerships• The promotional message <p><small>CERT Program Manager: Promoting Your Program PM 3-1 3-4</small></p> <p>Display Slide 3-4</p>	<p>Unit Topics</p> <p>Say that, to accomplish those objectives, this unit will look at:</p> <ul style="list-style-type: none">▪ Why we promote▪ To whom we promote▪ How to gain support through partnerships▪ The relationship between program promotion and goal setting▪ How to initiate and foster partnerships▪ The promotional message
 <p>Promotion: Why and Who</p> <ul style="list-style-type: none">• Top priority for Program Managers  <p><small>CERT Program Manager: Promoting Your Program PM 3-2 3-5</small></p> <p>Display Slide 3-5</p>	<p><i>Why We Promote and to Whom We Promote</i></p> <p>Say that program promotion is at the top of the list of priorities for CERT Program Managers.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

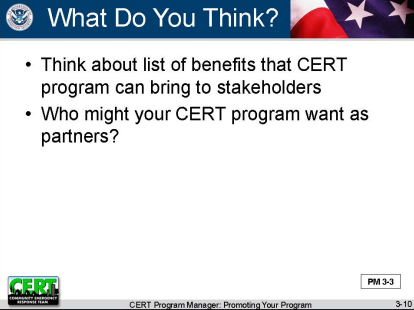
UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="237 354 652 667"><p>Why Promote?</p><ul style="list-style-type: none">• Why is it important to promote your CERT program?<ul style="list-style-type: none">– To get program started– To get volunteers– To keep program visible– To gain support from public– To gain support from potential sponsors– To gain support from community officials– To gain support from professional responders– To educate about need for preparedness<p><small>CERT Program Manager: Promoting Your Program PM 3-2 3-6</small></p></div> <p>Display Slide 3-6</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p> <div data-bbox="237 1178 652 1491"><p>CERT Stakeholders</p><ul style="list-style-type: none">• Every community member is a stakeholder• CERT program needs support of stakeholders to succeed• Support may be passive or active<p><small>CERT Program Manager: Promoting Your Program PM 3-2 3-7</small></p></div> <p>Display Slide 3-7</p>	<p>Ask participants:</p> <p>Why is it important to promote your CERT program?</p> <p>Summarize the discussion by reviewing a list of reasons why CERT programs must promote themselves:</p> <ul style="list-style-type: none">▪ To get the program started▪ To get volunteers▪ To keep the program visible▪ To gain support from the public▪ To gain support from potential sponsors▪ To gain support from community officials▪ To gain support from professional responders▪ To educate about the need for preparedness <p>Explain that every member of the community – from private citizens to businesses to government officials – holds a vital stake in preparedness and response. Regardless of how well a CERT program is organized, it cannot succeed unless it has the support of those stakeholders.</p> <ul style="list-style-type: none">▪ Sometimes that support is fairly passive. For example, not all potential stakeholders will end up being active CERT members.▪ In some cases stakeholders will see the usefulness of having a more active relationship with the CERT program. They see that the CERT program can benefit them and the community.

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="237 354 651 667"> <p>Why Promote?</p> <ul style="list-style-type: none"> • What benefits could the CERT program have for key stakeholders and the community? <ul style="list-style-type: none"> – Supports emergency management and its agencies – Expands emergency response capability of community – Is reliable resource for emergency responders in non-emergency situations – Expands home and workplace preparedness – Increases neighborhood and workplace involvement with public safety <p><small>CERT Program Manager: Promoting Your Program PM 3-3 3-8</small></p> </div> <p>Display Slide 3-8</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p> <div data-bbox="237 1178 651 1491"> <p>Importance of Partnerships</p> <ul style="list-style-type: none"> • Partners are stakeholders who see usefulness of having more active relationship with CERT program • Partnerships are essential in starting and sustaining CERT program <p><small>CERT Program Manager: Promoting Your Program PM 3-3 3-9</small></p> </div> <p>Display Slide 3-9</p>	<p>Ask participants:</p> <p>What benefits could the CERT program have for key stakeholders and the community?</p> <p>Summarize the discussion by reviewing what benefits a CERT program can have for key stakeholders and the community:</p> <ul style="list-style-type: none"> ▪ It supports emergency management and its agencies. ▪ It expands the emergency response capability of the community. ▪ It is a reliable resource for emergency responders in non-emergency situations. ▪ It expands home and workplace preparedness. ▪ It increases neighborhood and workplace involvement with public safety. <p><i>The Importance of Partnerships</i></p> <p>Say that the stakeholders who see the usefulness of having a more active relationship with the CERT program are potential partners. Partnerships are essential in starting and sustaining a CERT program.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 3-10</p> <p>Conduct a class discussion by asking these questions. Record the responses down the left side of an easel pad page.</p> <p>Some suggested responses:</p> <ul style="list-style-type: none">▪ Local high schools/school districts▪ Neighborhood and homeowner associations▪ Elected and appointed officials▪ Police department▪ Fire department▪ Public Health department▪ Civic and service agencies▪ Business and industry▪ Communications / media▪ Community colleges▪ Religious groups	<p>Ask participants:</p> <p>Tell participants to think about the list of benefits that a CERT program can bring to stakeholders.</p> <p>Who might your CERT program want as partners?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

PM, P. 3-4 to 3-5	Developing Partners Checklist
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The list below provides some suggestions for developing CERT partners. Use this list to help you determine whom you should approach to sell your program.

Type of Organization	Possible Contacts
Business and Industry	<input type="checkbox"/> Housing complexes <input type="checkbox"/> Large employers <input type="checkbox"/> Utility companies <input type="checkbox"/> Other:
Communications/Media Organizations	<input type="checkbox"/> Cable providers <input type="checkbox"/> Daily and weekly newspapers <input type="checkbox"/> Radio stations <input type="checkbox"/> Telephone companies <input type="checkbox"/> Television stations <input type="checkbox"/> Other:
Not-for-Profit Organizations	<input type="checkbox"/> Benevolent groups (e.g., Rotary, Kiwanis, Lions, Jaycees) <input type="checkbox"/> Civic and service organizations <input type="checkbox"/> Other:
Public Interest Groups	<input type="checkbox"/> American Association of Retired Persons chapter <input type="checkbox"/> Chamber of commerce <input type="checkbox"/> Environmental groups <input type="checkbox"/> Neighborhood associations / Homeowners associations <input type="checkbox"/> Neighborhood Watch groups <input type="checkbox"/> Parent-teacher organizations <input type="checkbox"/> The American Red Cross chapter <input type="checkbox"/> Other:
Health Care Providers	<input type="checkbox"/> Emergency medical services <input type="checkbox"/> Hospitals <input type="checkbox"/> Managed care facilities <input type="checkbox"/> Medical clinics <input type="checkbox"/> Other:

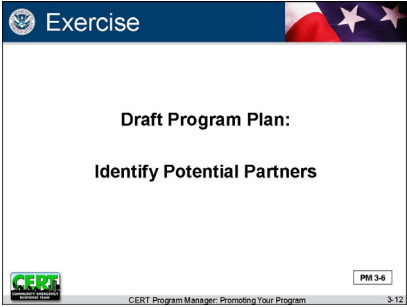
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

Type of Organization	Possible Contacts
Local Government Agencies	<ul style="list-style-type: none"><input type="checkbox"/> Elected and appointed officials<input type="checkbox"/> Local emergency management agency<input type="checkbox"/> Fire department<input type="checkbox"/> Law enforcement agencies<input type="checkbox"/> Planning department and zoning board<input type="checkbox"/> Public health agency<input type="checkbox"/> Public works departments<input type="checkbox"/> Other:
Workforce Groups	<ul style="list-style-type: none"><input type="checkbox"/> Professional groups<input type="checkbox"/> Union locals<input type="checkbox"/> Other:
Education Groups	<ul style="list-style-type: none"><input type="checkbox"/> Daycare and childcare providers<input type="checkbox"/> School superintendent<input type="checkbox"/> School board members<input type="checkbox"/> University and community colleges<input type="checkbox"/> Vocational and technical schools<input type="checkbox"/> Other:

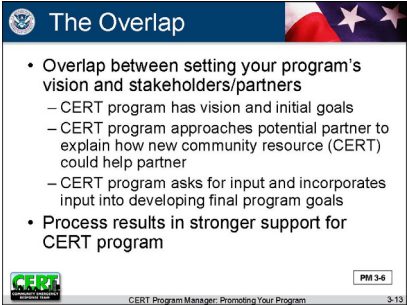
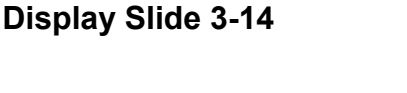
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Exercise</p> <p>Draft Program Plan: Identify Potential Partners</p> <p>CERT</p> <p>CERT Program Manager: Promoting Your Program 3-12</p> <p>Display Slide 3-12</p>	<p>Exercise: Draft Program Plan: Identify Potential Partners</p> <p>Purpose: This exercise allows existing Program Managers to identify organizations that already provide important partnerships and should be maintained. It allows all Program Managers to identify organizations in their community that could be targeted for partnership.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the first column of the second section, <i>Program Partners</i>, individually. <p>Debrief: Remind participants that identifying partners is especially important as a program is starting. However, Program Managers should always be alert for new potential partners.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

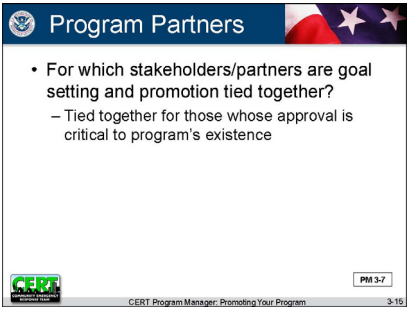
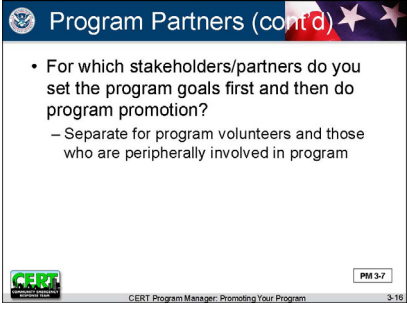
INSTRUCTOR GUIDANCE	CONTENT
 <p>The Overlap</p> <ul style="list-style-type: none">• Overlap between setting your program's vision and stakeholders/partners<ul style="list-style-type: none">– CERT program has vision and initial goals– CERT program approaches potential partner to explain how new community resource (CERT) could help partner– CERT program asks for input and incorporates input into developing final program goals• Process results in stronger support for CERT program <p><small>CERT Program Manager: Promoting Your Program 3-13</small></p>	<h3><i>Program Promotion and Goal Setting</i></h3> <p>Remind participants that in Unit 2 you talked about the overlap between setting your program's vision and promoting your program.</p> <ul style="list-style-type: none">▪ You can't promote your program without having a program vision.▪ You can't set the vision for your program without getting input from other people.▪ And people can't give you input without knowing about the program. <p>Tell participants to think about that overlap in terms of stakeholders and partners.</p> <ul style="list-style-type: none">▪ The CERT program has a vision and some initial goals.▪ The CERT program approaches a potential partner to explain how this new community resource (CERT) could help the partner.▪ The CERT program asks for input and incorporates the input into developing the final program goals.▪ This process results in stronger support for the CERT program. <p>Explain that the approach is not used for all program partners. A CERT program has different levels of partners:</p> <ul style="list-style-type: none">▪ For some of the partners, program promotion and goal setting are tied together.▪ For some, you set the goals first and then do the program promotion.
 <p>Levels of Partners</p> <ul style="list-style-type: none">• For some partners program promotion and goal setting are tied together• For other partners, CERT program sets goals first and then promotes program <p><i>They know you. Now, build the relationship.</i></p> <p><small>CERT Program Manager: Promoting Your Program 3-14</small></p>	

Display Slide 3-13

Display Slide 3-14

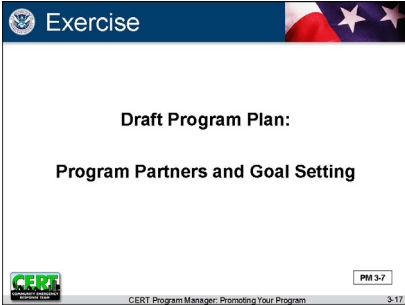
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>• For which stakeholders/partners are goal setting and promotion tied together? – Tied together for those whose approval is critical to program's existence</p> <p>Display Slide 3-15</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p>	<p>Ask participants:</p> <p>For which stakeholders/partners are goal setting and promotion tied together?</p> <p>Summarize the discussion by saying:</p> <ul style="list-style-type: none">▪ Goal setting and program promotion are tied together for those whose approval is critical to the program's existence.
 <p>• For which stakeholders/partners do you set the program goals first and then do program promotion? – Separate for program volunteers and those who are peripherally involved in program</p> <p>Display Slide 3-16</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask participants:</p> <p>For which stakeholders/partners do you set the program goals first and then do program promotion?</p> <p>Summarize the discussion by saying:</p> <ul style="list-style-type: none">▪ Goal setting and program promotion are separate for program volunteers and those who are peripherally involved in the program.

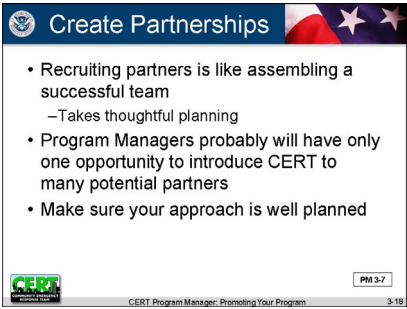

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 3-17</p>	<p>Exercise: Draft Program Plan: Program Partners and Goal Setting</p> <p>Purpose: This exercise allows Program Managers to review the current and potential partners list and identify whether they should be involved in goal setting.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the second column of the second section, <i>Program Partners</i>, individually by indicating whether the partner should be involved in goal setting. <p>Debrief: Discuss the exercise with participants. Was it clear to you who should be involved in goal setting?</p>

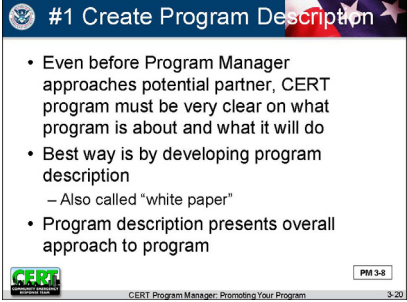
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="180 352 583 659"><p>Create Partnerships</p><ul style="list-style-type: none">• Recruiting partners is like assembling a successful team<ul style="list-style-type: none">– Takes thoughtful planning• Program Managers probably will have only one opportunity to introduce CERT to many potential partners• Make sure your approach is well planned<p><small>CERT Program Manager: Promoting Your Program 3-18</small></p></div> <p data-bbox="180 674 451 709">Display Slide 3-18</p> <p data-bbox="180 726 542 869">Encourage participants to talk with each other at breaks to share their experiences.</p> <div data-bbox="180 1199 583 1505"><p>How to Develop Partnerships</p><ol style="list-style-type: none">1. Create Program Description2. Develop plan for approaching each partner3. Schedule one-on-one meetings4. Maintain contact5. Constantly be alert for new partners<p><small>CERT Program Manager: Promoting Your Program 3-19</small></p></div> <p data-bbox="180 1520 451 1556">Display Slide 3-19</p>	<p data-bbox="609 359 1302 394"><i>How to Initiate and Foster Partnerships</i></p> <p data-bbox="609 415 1429 596">Tell participants that recruiting partners is like assembling a successful team. It takes thoughtful planning. Chances are that Program Managers will have only one opportunity to introduce CERT to many potential partners, so they will want their approach to be well thought out.</p> <p data-bbox="609 905 1429 974">Say that up to this point the course has talked about some of the elements in promoting a CERT program:</p> <ul data-bbox="609 995 1404 1171" style="list-style-type: none">▪ Developing good program goals▪ Identifying stakeholders and partners▪ Describing the possible benefits for both the program and partners <p data-bbox="609 1205 1437 1310">Say that the next step is to examine the process for initiating and fostering partnerships. This process involves five steps:</p> <ol data-bbox="609 1331 1331 1575" style="list-style-type: none">1. Creating a program description2. Developing a plan for approaching each partner3. Scheduling one-on-one meetings4. Maintaining contact5. Being constantly alert for new partners

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>#1 Create Program Description</p> <ul style="list-style-type: none">• Even before Program Manager approaches potential partner, CERT program must be very clear on what program is about and what it will do• Best way is by developing program description<ul style="list-style-type: none">– Also called “white paper”• Program description presents overall approach to program <p>Display Slide 3-20</p> <p>PM, P. 3-9</p>	<h3>#1 Create a Program Description</h3> <p>Explain that, even before a Program Manager approaches a potential partner, the program must be very clear on what the program is about and what it will do. The best way to do that is by developing a program description, also called a “white paper,” that presents the overall approach to the program.</p> <p>Refer participants to <i>What to Include in Your Program Description</i> in the Participant Manual and on the following page in the Instructor Guide.</p> <p>Reiterate that the program description should be handed out to partners, funders, etc.</p>

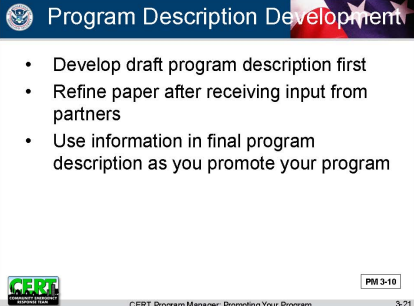
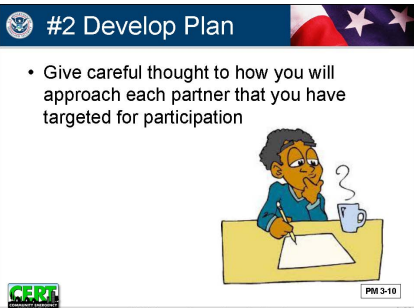

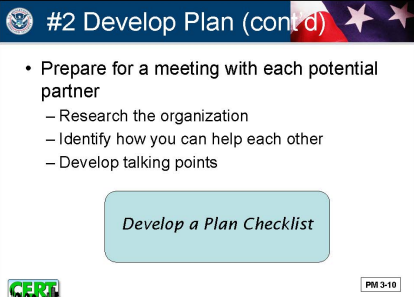
PM, P. 3-9	What to Include in Your Program Description
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The "white paper" should include the information listed below. As you consider your community's needs, you may find other topics that should be included in the "white paper" as well.

Topic	What to Include
Current Situation in the Community	<ul style="list-style-type: none"> • Threats faced by the community • Population needs • Number of professional responders • How CERTs can augment the response
Program Goals and Expectations	<ul style="list-style-type: none"> • An overview of what CERTs will do in an emergency or disaster • How CERTs will complement professional responders • How many people will be trained in the first year • An estimate of how many people will be trained over the first 5 years • How skill levels will be maintained
Training Strategy	<ul style="list-style-type: none"> • Training curriculum (Note: The FEMA curriculum can be augmented if the community faces additional threats to unusual conditions.) • Training methods
Team Organization	<ul style="list-style-type: none"> • Types of teams: Neighborhood teams, rural area teams, workplace teams, non-profit organization teams, and others • How the Incident Command System (ICS) will be used to manage the CERT response
Linkages with the Existing Response System	<ul style="list-style-type: none"> • Protocols for "self-activation" and "call out" • Procedures for communicating with professional responders • Level of control by emergency responders

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Program Description Development</p> <ul style="list-style-type: none">• Develop draft program description first• Refine paper after receiving input from partners• Use information in final program description as you promote your program <p>CERT Program Manager: Promoting Your Program PM 3-10 3-21</p>	<p>Explain that Program Managers will begin by developing a draft program description. The paper will be refined after receiving input from partners. The information in the final program description can be used as you promote your program.</p>
<p>Display Slide 3-21</p>  <p>#2 Develop Plan</p> <ul style="list-style-type: none">• Give careful thought to how you will approach each partner that you have targeted for participation  <p>CERT Program Manager: Promoting Your Program PM 3-10 3-22</p>	<p>#2 Develop a Plan for Approaching Each Partner</p> <p>Explain that you will want to give careful thought to how you will approach each partner that you have targeted for participation.</p>
<p>Display Slide 3-22</p>  <p>#2 Develop Plan (cont'd)</p> <ul style="list-style-type: none">• Prepare for a meeting with each potential partner<ul style="list-style-type: none">– Research the organization– Identify how you can help each other– Develop talking points <p><i>Develop a Plan Checklist</i></p> <p>CERT Program Manager: Promoting Your Program PM 3-10 3-23</p>	<p>Explain that there are three parts to developing a plan for approaching a partner. Here is what you need to do to prepare for a meeting with a potential partner:</p> <ol style="list-style-type: none">1. Research the organization.2. Identify the ways you can help each other.3. Develop talking points.
<p>Display Slide 3-23</p> <p>PM, P. 3-11</p>	<p>Refer participants to the <i>Develop a Plan Checklist</i> in the Participant Manual and on the next page in the Instructor Guide.</p> <p>Review the checklist with participants.</p>

PM, P. 3-11	Develop a Plan Checklist
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Research the Organization

1. What does the organization do?
2. What are its concerns relating to disaster and community preparedness?
3. What is its relationship with emergency response?
4. What motivates the organization?
5. Who in the organization might be a champion for CERT?

Identify Where You Can Help Each Other

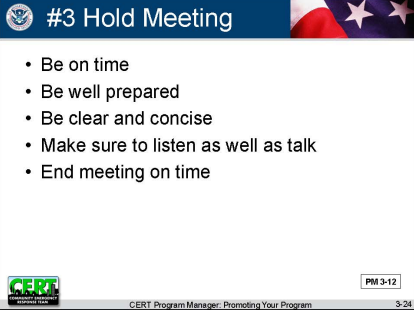
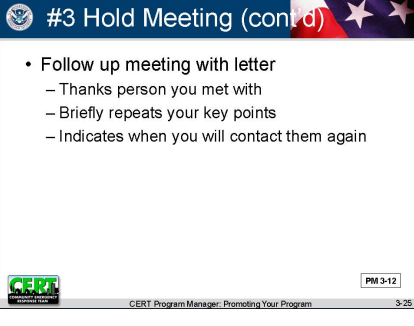
1. How can CERT benefit the organization?
2. What can the organization offer CERT?

Develop Talking Points from Your Research

1. What the CERT program is
2. What the CERT program can accomplish if supported
3. A clear message on why the organization should participate and how its support will help
4. What the CERT program can provide the organization, e.g., training, materials
5. Committing personal time and perhaps financial resources requires a full understanding of the CERT program. A partner will want to know, “What’s in it for me?” The partner will also want to know, “What makes CERT so important?” Have a response ready, including some success stories.


COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>#3 Hold Meeting</p> <ul style="list-style-type: none">• Be on time• Be well prepared• Be clear and concise• Make sure to listen as well as talk• End meeting on time <p>CERT Program Manager: Promoting Your Program 3-24</p>	<h3>#3 Schedule a One-on-One Meeting</h3> <p>Explain that the next step is to meet with one or more people from the organization. The purpose of the meeting is to present your talking points.</p> <p>Provide these reminders about good meeting protocol:</p> <ul style="list-style-type: none">▪ Be on time.▪ Be well prepared (your presentation, copies of an agenda, materials to leave behind, etc.).▪ Be clear and concise.▪ Make sure to listen as well as talk.▪ End the meeting on time.
<p>Display Slide 3-24</p>	
 <p>#3 Hold Meeting (cont'd)</p> <ul style="list-style-type: none">• Follow up meeting with letter<ul style="list-style-type: none">– Thanks person you met with– Briefly repeats your key points– Indicates when you will contact them again <p>CERT Program Manager: Promoting Your Program 3-25</p>	<p>Remind participants to follow up the meeting with a letter that:</p> <ul style="list-style-type: none">▪ Thanks the person you met with▪ Briefly repeats your key points▪ Indicates when you will contact them again
<p>Display Slide 3-25</p>	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>#4 Maintain Contact</p> <ul style="list-style-type: none">• Have regular communication with organization's contact• Make it win-win relationship<ul style="list-style-type: none">– Promote your partners as you promote CERT program– Offer services to partner– Make it easy to do business with CERT program <p>Display Slide 3-26</p>	<h3>#4 Maintain Contact</h3> <p>Explain that Program Managers should identify a contact person with the organization. Communicate regularly with the contact person. The frequency of the contact will depend on the nature of the partnership. For example, sponsors will hear from the Program Manager more frequently than will the president of a Neighborhood Watch group.</p> <p>Tell participants that you want to make it a win-win relationship:</p> <ul style="list-style-type: none">▪ Think of ways that you can promote your partners as you promote the CERT program. For example, if the CERT program has a media opportunity, give credit to the partners.▪ Offer services to the partner (for example, training for their members or employees, access to general information on emergency preparedness).▪ Make it easy to do business with the CERT program.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="237 354 654 667"><p>#5 Watch for New Partners</p><ul style="list-style-type: none">• Job of recruiting partners is ongoing<ul style="list-style-type: none">– Keep notes of contacts you make and possible resources they can provide– Encourage partners to identify others who can contribute to CERT program<p><small>CERT Program Manager: Promoting Your Program PM 3-13 3-27</small></p></div> <p data-bbox="237 682 509 720">Display Slide 3-27</p> <div data-bbox="237 808 316 882"></div> <p data-bbox="237 961 516 999">PM, P. 3-14 to 3-15</p>	<h3 data-bbox="678 359 1112 394">#5 Be Alert for New Partners</h3> <p data-bbox="678 411 1464 556">Tell participants that every community has dynamos in the public and private sector who can lead with powerful effectiveness. The job of recruiting partners is ongoing.</p> <ul data-bbox="678 573 1453 772" style="list-style-type: none">▪ Keep notes of contacts you make and the possible resources they can provide.▪ As you recruit partners, encourage them to identify others who can contribute, personally or financially, to the CERT program. <p data-bbox="678 808 917 844">Ask participants:</p> <p data-bbox="678 858 1448 930">Does anyone have anything to add about initiating and fostering partnerships?</p> <p data-bbox="678 961 1404 1144">Refer participants to <i>Gaining Support from Local Leaders</i> in the Participant Manual and the following page in the Instructor Guide. It provides important information on working with some very important partners – local community leaders.</p>

PM, P. 3-14 to 3-15	Gaining Support from Local Leaders
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Regardless of how you fund your program, the support of local elected and appointed officials will be necessary, even if only to support the time that you will spend as Program Manager. In most communities, however, you will need the support of local leaders prior to startup because, ultimately, local leaders control program funding.

To gain the support of local leaders, try the tips listed below:


Do your research first. The more knowledgeable you are about CERTs, what they can do, how much they cost, and the benefits they can provide the community, the more credibility you will have with those who control the decision-making and the purse strings. Use the "white paper" you developed to support your program strategy as your basis to ensure that you can answer as many questions as possible about what CERTs can do for your community's response efforts. Provide several success stories about how CERTs have been used in other (preferably similar) communities.

Determine your approach. As with nearly any program, the CERT Program can be approached in terms of "It's a real resource!" or "It's another new program!" Undoubtedly, the first approach will bring you more success. Be ready to provide examples of how the CERT Program supplements local response resources, and be prepared to explain how you can make that happen in your community.

Offer CERT as a potential resource for multiple agencies. CERT personnel are able and willing to help in a variety of settings. Suggest that they can help with tasks such as installing smoke detectors and batteries, providing medical assistance at local parades and community events, or helping staff fire safety awareness booths at fire station open houses. The more versatile you can show CERTs to be, the more likely it is that you'll gain approval for the program.

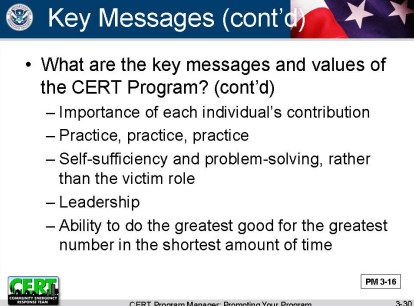


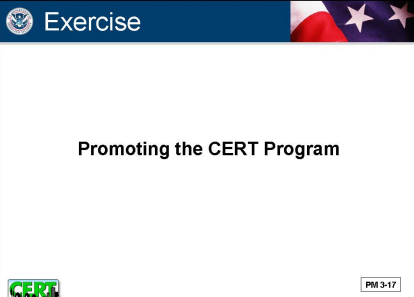
Keep elected officials in the loop. Include local elected officials on e-mailing lists or newsletter mailing lists so that they are aware of what you're doing to make CERTs successful and how CERTs are benefiting the community. Keep them aware of the progress you're making – how many CERT members you've trained, how often they have been activated, and whether there is a backlog of requests for training – so that the program stays "on their desks." When your program demonstrates its worth, let the elected officials take the credit. Invite local elected officials and chief officers to hand out certificates at graduation. Look for opportunities to make elected officials a visible part of the program to the community.

Finally, if your CERT program is established but doesn't have the support from local leaders that it needs, try scheduling an exercise or other event to demonstrate how CERTs operate and the benefits that a CERT can offer to the community. Invite local officials to an exercise involving CERT or schedule an exercise in a public place that will gain the attention of the media.

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="240 359 646 394">Promotional Message</p>  <p data-bbox="240 632 646 667">CERT Program Manager: Promoting Your Program 3-28</p> <p data-bbox="240 684 509 720">Display Slide 3-28</p> <p data-bbox="240 751 646 787">Key Messages</p> <ul data-bbox="261 806 625 1010" style="list-style-type: none"> • What are the key messages and values of the CERT Program? <ul style="list-style-type: none"> – Safety, safety, safety; "safety first" – Teamwork – Community members helping each other in the neighborhood, workplace, school, etc. – Valuing volunteers and CERT as an asset to the community – Preparedness <p data-bbox="240 1024 646 1060">CERT Program Manager: Promoting Your Program 3-29</p> <p data-bbox="240 1077 509 1113">Display Slide 3-29</p> <p data-bbox="240 1131 618 1241">This slide is animated. The first click displays the question.</p> <p data-bbox="240 1257 623 1329">Conduct a class discussion by asking this question.</p> <p data-bbox="240 1346 654 1417">The second click displays the responses.</p> <p data-bbox="240 1434 634 1543">Before moving on, ask the participants if they have any questions.</p>	<p data-bbox="683 359 1144 394"><i>The Promotional Message</i></p> <p data-bbox="683 417 1487 527">Say that so far this unit has covered why to promote, the benefits of promotion, and to whom to promote. Now it is time to talk about the promotional message.</p> <p data-bbox="683 751 743 787">Ask:</p> <p data-bbox="683 806 1463 877">What are the key messages and values of the CERT Program?</p> <p data-bbox="683 896 1442 968">Summarize the discussion by providing the key CERT messages:</p> <ul data-bbox="683 987 1414 1304" style="list-style-type: none"> ▪ Safety, safety, safety; "safety first" ▪ Teamwork ▪ Community members helping each other in the neighborhood, workplace, school, other venues ▪ Valuing volunteers and CERT as an asset to the community ▪ Preparedness

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>Key Messages (cont'd)</p> <ul style="list-style-type: none">• What are the key messages and values of the CERT Program? (cont'd)<ul style="list-style-type: none">– Importance of each individual's contribution– Practice, practice, practice– Self-sufficiency and problem-solving, rather than the victim role– Leadership– Ability to do the greatest good for the greatest number in the shortest amount of time <p><small>CERT Program Manager: Promoting Your Program 3-30</small></p>	<ul style="list-style-type: none">▪ Importance of each individual's contribution▪ Practice, practice, practice▪ Self-sufficiency and problem-solving, rather than the victim role▪ Leadership▪ Ability to do the greatest good for the greatest number in the shortest amount of time
<p>Display Slide 3-30</p>  <p>Which Message Is Right?</p> <ul style="list-style-type: none">• Needs of target audience dictate:<ul style="list-style-type: none">– What promotional message CERT program uses– How that message is communicated  <p><small>CERT Program Manager: Promoting Your Program 3-31</small></p>	<p>Explain that what promotional message a CERT program uses and how that message is communicated differ depending on the needs of each target audience. What you will say to a large employer and how you communicate it will be different from what you say to a parent-teacher organization and how you communicate it.</p>
<p>Display Slide 3-31</p>  <p>Exercise</p> <p>Promoting the CERT Program</p> <p><small>CERT Program Manager: Promoting Your Program 3-32</small></p>	<p>Exercise: Promoting the CERT Program</p> <p>Purpose: This exercise breaks participants into small groups to strategize techniques for promoting the program to different audiences.</p>
<p>Display Slide 3-32</p>	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
PM, P. 3-18	<p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Divide the class into five small groups.2. Assign a different target audience to each small group:<ol style="list-style-type: none">a. Local public works agency directorsb. Elected officialsc. High school principals / vice principalsd. Neighborhood associationse. General publicf. Retirement communitiesg. Small businessesh. Leaders of faith groups3. Refer participants to <i>Promoting the CERT Program</i> in the Participant Manual and on the following pages in the Instructor Guide.4. Review the instructions:<ol style="list-style-type: none">a. Strategize the messages and techniques you will use to promote your CERT program to this target audience.b. Remember to consider the needs of each organization and what one has to offer the other.c. You have 10 minutes.d. You will report your plan to the whole group.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
<p>As the small groups report out, post the ideas for everyone's benefit.</p>	<p>Debrief:</p> <ol style="list-style-type: none">1. Compliment the small groups on their work. Point out the different strategies that are offered:<ol style="list-style-type: none">a. Use of media (TV, radio, newspapers, Internet)b. Marketing materials (releases, flyers, articles in newsletters)c. Targeting most vulnerable areas (e.g., highest casualty predictions, people in storm surge communities who won't evacuate)d. Speakers bureaue. Word of mouthf. Etc.2. Ask: who should you target first when planning program promotion?<ol style="list-style-type: none">a. Answer: Start with most vulnerable areas (e.g., those with highest casualty predictions, people in storm surge communities who won't evacuate).3. Ask: What are the factors that affect promotion?<p>Possible answers:</p><ol style="list-style-type: none">a. Competing volunteer programs (e.g., Red Cross). Who else is asking for volunteers?b. Timing:<ul style="list-style-type: none">• Seasonal disasters. In some jurisdictions disasters occur on a cyclical basis, e.g., hurricanes, flooding, tornadoes. It makes sense to promote CERT prior to the beginning of these cycles.• Day of the week or time of day that training is scheduled. Training classes should be scheduled to accommodate volunteers.• Budget cycles. Identify the budgeting process in your jurisdiction and work in concert with it.

PM, P. 3-18	Promoting the CERT Program
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Instructions:

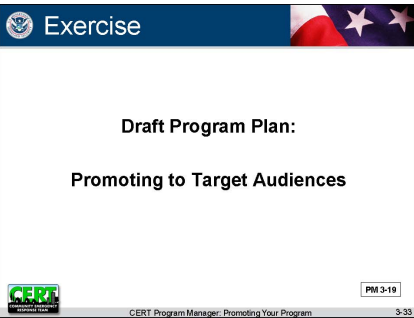
Our target audience: _____

Our goal: _____

1. Strategize the messages and techniques you will use to promote your CERT program to this target audience.
2. Remember to consider the needs of each organization (CERT and the partner) and what one has to offer the other.
3. You have 10 minutes.
4. You will report your plan to the whole group.




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
 <p>The slide features a blue header with the word "Exercise" and a small American flag icon. The main text reads "Draft Program Plan: Promoting to Target Audiences". At the bottom left is the CERT logo, and at the bottom right is a box containing "PM 3-19". The footer text reads "CERT Program Manager: Promoting Your Program" and "3-33".</p> <p>Display Slide 3-33</p>	<p>Exercise: Draft Program Plan: Promoting to Target Audiences</p> <p>Purpose: This exercise allows Program Managers to record their ideas on what promotional messages and strategies they will use for three partners of their CERT programs.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the matrix in Section 3, <i>Promoting to Target Audiences</i>. <p>Debrief: Discuss the exercise with participants. Ask some participants to share their messages and strategies.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 3: PROMOTING YOUR PROGRAM

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="240 359 678 401"> Unit Summary</p> <ul data-bbox="261 415 623 575" style="list-style-type: none">• Why We Promote and To Whom We Promote• The Importance of Partnerships• Program Promotion and Goal Setting• How to Initiate and Foster Partnerships• The Promotional Message <p data-bbox="240 646 678 688"> <small>CERT Program Manager: Promoting Your Program</small> PM 3-19 3-34</p> <p data-bbox="240 701 509 743">Display Slide 3-34</p> <p data-bbox="240 842 315 911"></p>	<p data-bbox="708 359 961 401"><i>Unit Summary</i></p> <p data-bbox="708 415 1435 485">Tell participants that this unit has looked at program promotion:</p> <ul data-bbox="708 506 1398 751" style="list-style-type: none">▪ Why We Promote and To Whom We Promote▪ The Importance of Partnerships▪ Program Promotion and Goal Setting▪ How to Initiate and Foster Partnerships▪ The Promotional Message <p data-bbox="708 835 1487 905">Do you have any questions about anything covered in this unit?</p> <p data-bbox="708 995 862 1031">Transition</p> <p data-bbox="708 1045 1455 1115">The next unit will discuss how to orient, manage, and retain volunteers for your program.</p>

UNIT 4: WORKING WITH VOLUNTEERS

In this unit you will learn about:

- **The Program Manager and the CERT Volunteer.** The roles of Program Manager and volunteer.
- **Recruit Volunteers.** How to find and recruit volunteers.
- **Orient Volunteers.** What orientation is needed, the membership application, and determining the volunteer's work.
- **Track Volunteers.** What information to track and why to track volunteers.
- **Manage Volunteers.** Why volunteers need to be managed and the management tasks involved.
- **Retain Volunteers.** How to meet the needs of volunteers, communicate effectively with them, and show recognition of their value.
- **Terminate a Volunteer:** What to do if it is necessary to terminate a volunteer.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

- Establish a process for working with volunteers.
 - Describe how to recruit volunteers.
 - Describe how to orient volunteers.
 - Explain why to track volunteers.
 - Describe methods for managing volunteers.
 - Identify techniques for retaining volunteers.
 - Identify strategies for terminating volunteers.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- The Program Manager and the CERT Volunteer
- Recruit Volunteers
- Orient Volunteers
- Track Volunteers
- Manage Volunteers
- Retain Volunteers
- Terminate a Volunteer
- Unit Summary

**ESTIMATED
COMPLETION
TIME**

2 hours

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

**TRAINING
METHODS**

The instructor starts by providing an overview of the Program Manager's role with volunteers: recruiting, orienting, tracking, managing, and retaining. The instructor emphasizes the importance of being clear about the ways that the program will use volunteers, including writing volunteer job descriptions.

Then the instructor conducts a guided discussion about recruiting volunteers and participants record recruitment ideas in their Draft Program Plan.

The instructor next discusses orienting volunteers to the National CERT Program and to the local CERT program. Included is the importance of setting standards and expectations. The instructor explains that part of orientation is formalizing a relationship with the volunteer: completing a membership explanation, performing a background check, and entering information into a CERT member database. Finally the program and the volunteer need to identify how the volunteer wants to work with the program.

Then the instructor conducts a guided discussion about tracking volunteers: what needs to be tracked and why tracking is important.

Following this, participants and the instructor discuss the tasks in managing volunteers, training them, assigning tasks, monitoring their work, and finally evaluating them and providing feedback.

Participants then strategize management tasks for various scenarios.

Next the instructor conducts a guided discussion on volunteer retention: why people volunteer, what their needs are as volunteers, and activities involved in volunteer retention. Participants then break into small groups to design volunteer recognition opportunities. Participants capture ideas they have for volunteer retention in their Draft Program Plan.

Finally, the instructor briefly discusses terminating a volunteer.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

- RESOURCES REQUIRED**
- *Community Emergency Response Team Program Manager Instructor Guide (for instructors)*
 - *Community Emergency Response Team Program Manager Participant Manual (for participants)*
 - PowerPoint slides 4-1 to 4-44

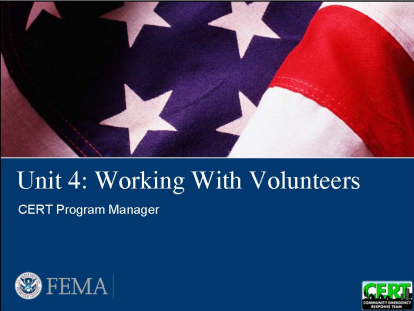
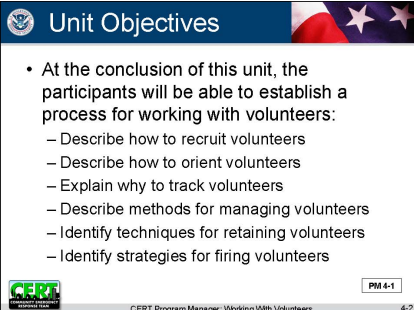
- EQUIPMENT**
- The following equipment is required for this unit:
- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers

NOTES

A suggested time plan for this unit is as follows:







Unit Overview	1 minute
The Program Manager and the CERT Volunteer.....	10 minutes
#1 Recruit Volunteers	15 minutes
Draft Program Plan: Identify Recruitment Options.....	5 minutes
#2 Orient Volunteers.....	20 minutes
#3 Track Volunteers	10 minutes
#4 Manage Volunteers	20 minutes
#5 Retain Volunteers	28 minutes
Draft Program Plan: Capture Retention Ideas	5 minutes
Terminate a Volunteer	5 minutes
Unit Summary.....	1 minute
Total Time: 2 hours	

Unit 4: Working with Volunteers

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-1</p>  <p>Display Slide 4-2</p>	<p>Unit Overview</p> <p>Say that this unit looks at processes that can be used to work with volunteers.</p> <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to establish a process for working with volunteers:</p> <ul style="list-style-type: none"> ▪ Describe how to recruit volunteers. ▪ Describe how to orient volunteers. ▪ Explain why to track volunteers. ▪ Describe methods for managing volunteers. ▪ Identify techniques for retaining volunteers. ▪ Identify strategies for terminating volunteers.

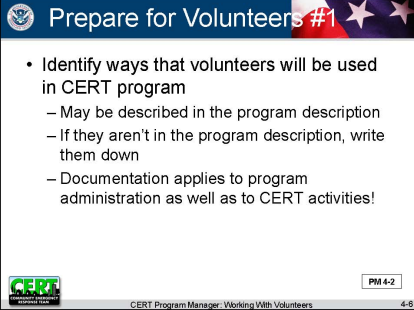
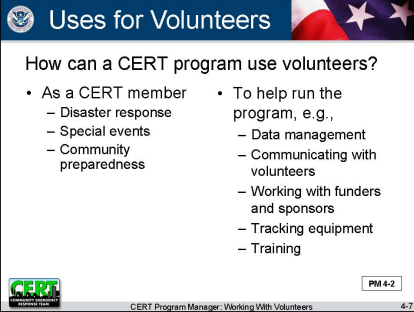
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 401"> Unit Topics</p> <ul data-bbox="212 411 581 617" style="list-style-type: none">• The Program Manager and the CERT Volunteer• Recruit Volunteers• Orient Volunteers• Track Volunteers• Manage Volunteers• Retain Volunteers• Terminate a Volunteer <p data-bbox="191 632 602 667"> PM 4-1 CERT Program Manager: Working With Volunteers 4-3</p> <p data-bbox="191 684 444 720">Display Slide 4-3</p>	<p data-bbox="634 359 808 394">Unit Topics</p> <p data-bbox="634 411 1382 478">Say that, to accomplish those objectives, this unit will look at:</p> <ul data-bbox="634 499 1360 846" style="list-style-type: none">▪ The Program Manager and the CERT Volunteer▪ Recruit Volunteers▪ Orient Volunteers▪ Track Volunteers▪ Manage Volunteers▪ Retain Volunteers▪ Terminate a Volunteer
<p data-bbox="191 940 602 982"> Program Mgr and Volunteers</p> <ul data-bbox="212 993 581 1129" style="list-style-type: none">• Volunteers are backbone of program<ul data-bbox="233 1014 581 1129" style="list-style-type: none">– Provide administrative support– Run parts of program– Train CERT volunteers– Make up teams that serve community <p data-bbox="191 1209 602 1245"> PM 4-2 CERT Program Manager: Working With Volunteers 4-4</p> <p data-bbox="191 1262 444 1297">Display Slide 4-4</p>	<p data-bbox="634 940 1284 1014"><i>The Program Manager and the CERT Volunteer</i></p> <p data-bbox="634 1035 1442 1182">Say that the CERT Program could not exist without volunteers. Since the Program Manager may be the only paid staff member in a CERT program, volunteers are the backbone of the program. Volunteers:</p> <ul data-bbox="634 1203 1328 1392" style="list-style-type: none">▪ Provide administrative support.▪ Run parts of the program.▪ Train CERT volunteers.▪ Make up the teams that serve the community.
<p data-bbox="191 1434 602 1476"> Working with Volunteers</p> <ul data-bbox="212 1486 581 1581" style="list-style-type: none">• Program Manager must know how to work with volunteers<ul data-bbox="233 1528 581 1581" style="list-style-type: none">– Skills are same as working with paid staff– Difference is in how you apply those skills <p data-bbox="191 1703 602 1738"> PM 4-2 CERT Program Manager: Working With Volunteers 4-5</p> <p data-bbox="191 1755 444 1791">Display Slide 4-5</p>	<p data-bbox="634 1434 1414 1570">Explain that it is therefore essential that a Program Manager know how to work with volunteers. In some ways, the skills are the same as working with paid staff, but there are differences in how you apply those skills.</p> <p data-bbox="634 1591 1409 1728">Explain how we usually think that recruiting is the first step in working with volunteers. But, before a Program Manager can start recruiting, he or she has to be prepared for the first volunteer.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>• Identify ways that volunteers will be used in CERT program</p> <ul style="list-style-type: none">– May be described in the program description– If they aren't in the program description, write them down– Documentation applies to program administration as well as to CERT activities! <p>Display Slide 4-6</p>  <p>How can a CERT program use volunteers?</p> <ul style="list-style-type: none">• As a CERT member<ul style="list-style-type: none">– Disaster response– Special events– Community preparedness• To help run the program, e.g.,<ul style="list-style-type: none">– Data management– Communicating with volunteers– Working with funders and sponsors– Tracking equipment– Training <p>Display Slide 4-7</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p> <p>PM, P. 4-4 to 4-5</p>	<h3>Identify Ways to Use Volunteers</h3> <p>Describe one way to prepare:</p> <ul style="list-style-type: none">▪ Identify the ways that volunteers will be used in the program.<ul style="list-style-type: none">• These may be described in the program's program description.• If they aren't in the paper, write them down. Documentation applies to program administration as well as to CERT activities! <p>Ask participants:</p> <h3>How can a CERT program use volunteers?</h3> <p>Summarize the discussion by reviewing the ways that a CERT program can use volunteers:</p> <ul style="list-style-type: none">▪ As a CERT member<ul style="list-style-type: none">• Disaster response• Special events• Community preparedness▪ To help run the program, e.g.,<ul style="list-style-type: none">• Data management• Communicating with volunteers• Working with funders and sponsors• Tracking equipment• Training <p>Refer participants to <i>Roles of Program Manager and Volunteers</i> in the Participant Manual and on the following page in the Instructor Guide.</p>

PM, P. 4-4 to 4-5	Roles of Program Manager and Volunteers
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CERT Program Manager

As the CERT Program Manager, you are responsible for the overall success of the program for your community. But what does a Program Manager do? Some of your key responsibilities are listed below. As you progress through program development and introduce program maintenance, you will identify other responsibilities. When you do, add them to this list as a reminder of what it takes to run a CERT program.

You will not be able to make the program successful if you don't have help. You should delegate some responsibilities. CERT members may have leadership, administrative, and creative talents that can help you. Remember, it is their program.

General Management

- Develop the initial plan for implementing a CERT program in the community.
- Develop forms and records or a database to track training, program participation, exercises, mailings, etc.
- Develop a budget and obtain funding.
- Maintain records (financial, inventory, database of CERT members, etc.).
- Coordinate a CERT electronic newsletter or other mailings to maintain contact with current CERT volunteers.
- Establish Standard Operating Procedures for the use of CERTs in disaster and non-disaster situations.
- Evaluate the overall program.

Marketing

- Gain support by marketing the plan to local leaders, unions, first responders, citizens, employers, and potential partners.
- Pitch to the media to gain public recognition of CERT capabilities and accomplishments.




Training

- Train administrative staff to handle public inquiries by phone and e-mail about the program.
- Schedule training, follow-up training, exercises, special events, etc.
- Arrange all program logistics, including classroom setup.
- Identify, recruit, train, and schedule instructors.
- Recruit class participants.
- Maintain the course content.
- Provide an orientation at the beginning of each course (very important for new programs, less important in well-established programs).
- Monitor classroom delivery.
- Evaluate training and results.
- Arrange for speakers at graduation.
- Develop supplemental classes, exercises, and projects to keep CERT members involved and improve their skills.

Administrative Assistance (Paid or Volunteer)

CERT will generate a lot of telephone calls and a lot of paperwork. While you are operating the program, you will need someone reliable to assist you by:

- Answering telephone calls and responding to routine inquiries
- Processing mailings
- Processing registrations
- Arranging the training logistics
- Maintaining the CERT member database
- Arranging for the printing of course materials, flyers, brochures, and other CERT materials
- Helping with a newsletter and/or Web site

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 394">  </p> <ul data-bbox="212 415 430 485" style="list-style-type: none"> • Write job descriptions <ul style="list-style-type: none"> – Team member role – Other volunteer positions  <p data-bbox="191 684 444 720">Display Slide 4-8</p> <p data-bbox="191 751 602 787">  </p> <ul data-bbox="212 808 560 976" style="list-style-type: none"> • Why is it a good idea to have written job descriptions? <ul style="list-style-type: none"> – They let the volunteer know what your expectations are – They give you something to evaluate performance against and something to fall back on if performance is inadequate or unacceptable <p data-bbox="191 1077 444 1113">Display Slide 4-9</p> <p data-bbox="191 1134 570 1239">This slide is animated. The first click displays the question.</p> <p data-bbox="191 1260 570 1329">Conduct a class discussion by asking this question.</p> <p data-bbox="191 1350 602 1419">The second click displays the responses.</p> <p data-bbox="191 1440 586 1545">Before moving on, ask the participants if they have any questions.</p>	<p data-bbox="634 359 980 394">Write Job Descriptions</p> <p data-bbox="634 415 1305 451">Describe another way to prepare for volunteers:</p> <ul data-bbox="634 472 1404 674" style="list-style-type: none"> ▪ Write job descriptions. <ul style="list-style-type: none"> • The team member role is well defined in the <i>CERT Basic Training</i>. • However, you will want to write down the descriptions for other CERT volunteer positions. <p data-bbox="634 751 867 787">Ask participants:</p> <p data-bbox="634 808 1240 877">Why is it a good idea to have written job descriptions?</p> <p data-bbox="634 898 1365 968">Summarize the discussion by saying that written job descriptions do two things:</p> <ul data-bbox="634 989 1421 1178" style="list-style-type: none"> ▪ They let the volunteer know what your expectations are. ▪ They give you something to evaluate performance against and something to fall back on if performance is inadequate or unacceptable.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
PM, P. 4-7	<p>Mention that at the end of the unit there will be a short discussion about terminating volunteers, something that does have to be dealt with periodically.</p> <p>Emphasize that job descriptions do not have to be lengthy or formal, but they should be as complete as possible. Refer participants to <i>Developing a Job Description</i> in the Participant Manual and on the following page in the Instructor Guide.</p>

PM, P. 4-7	Developing a Job Description
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When developing a job description, think about:

- The purpose of the job. How will the position help your program achieve its mission?
- The job responsibilities. What tasks will you expect the volunteer to do?
- Job qualifications. What knowledge, skills, and abilities (KSAs) are required for the job?
- To whom the volunteer will report. Will he or she report directly to you or to another volunteer?
- The time commitment required for the position. How many hours each week or month are required to ensure that the job responsibilities can be accomplished within a reasonable time frame and without undue stress?
- The length of the appointment. How long will the position be required? Is the job open ended, or is it a position that is only required during an emergency?
- Who will provide support for the position. Will the volunteer work independently, or will he or she rely on others in the program (e.g., volunteer communications, program promotion, training coordination)?

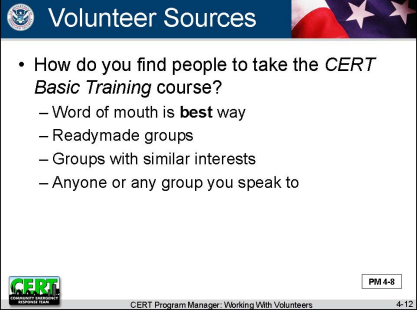
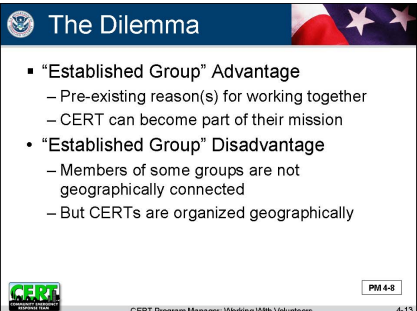
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>CERT Program Manager: Working With Volunteers 4-10</p>	<h3>#1 Recruit Volunteers</h3> <p>Explain that you are now going to look more in depth at each of the activities in a volunteer program. The first thing a Program Manager needs to do is to find volunteers.</p>
<p>Display Slide 4-10</p>  <p>CERT Program Manager: Working With Volunteers 4-11</p>	<p>Explain that the primary gateway to a CERT program is through <i>CERT Basic Training</i>. This training helps participants identify whether they want to be an active member of the program or whether they just want the information for personal use, but are not able to make a larger time commitment.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 359 605 667"><p>Volunteer Sources</p><ul style="list-style-type: none">• How do you find people to take the <i>CERT Basic Training</i> course?<ul style="list-style-type: none">– Word of mouth is best way– Readymade groups– Groups with similar interests– Anyone or any group you speak to<p><small>CERT Program Manager: Working With Volunteers 4-12</small></p></div> <p>Display Slide 4-12</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p> <div data-bbox="191 1178 605 1486"><p>The Dilemma</p><ul style="list-style-type: none">▪ “Established Group” Advantage<ul style="list-style-type: none">– Pre-existing reason(s) for working together– CERT can become part of their mission• “Established Group” Disadvantage<ul style="list-style-type: none">– Members of some groups are not geographically connected– But CERTs are organized geographically<p><small>CERT Program Manager: Working With Volunteers 4-13</small></p></div> <p>Display Slide 4-13</p>	<p>Ask participants:</p> <p>How do you find people to take the <i>CERT Basic Training</i> course?</p> <p>Summarize the discussion by listing some ways and places to recruit volunteers:</p> <ul style="list-style-type: none">▪ Word of mouth is the best way.▪ Ready-made groups: Homeowners associations; community and neighborhood groups; faith groups; parent-teacher organizations; senior groups; ethnic and cultural groups; workplaces▪ Groups with similar interests: Disaster response; emergency preparedness; amateur radio clubs▪ Anyone or any group you speak to <p>Discuss the particular dilemma for recruiting CERT volunteers:</p> <ul style="list-style-type: none">▪ Reaching out to “established” groups is easier than trying to recruit individuals one at a time.<ul style="list-style-type: none">• Established groups have a pre-existing reason(s) for working together.• CERT can become part of their mission.▪ However, the concept of CERT is that a team organizes geographically.<ul style="list-style-type: none">• Members of some groups are not geographically connected. <p>Say that Program Managers need to be ready to address this potential dilemma when recruiting.</p>

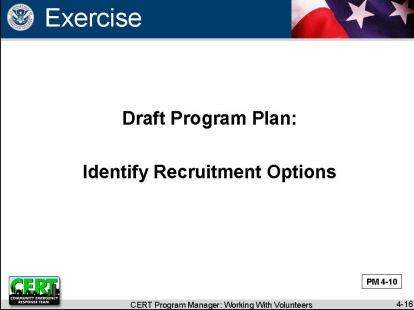
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="190 354 605 667"><p>Recruitment Message Elements</p><ol style="list-style-type: none">1. Opening2. Statement of need3. Statement of solution4. Statement of level of knowledge needed5. Statement of benefits6. Contact point<p>CERT Program Manager: Working With Volunteers 4-14</p></div> <p>Display Slide 4-14</p> <div data-bbox="190 1291 605 1604"><p>Stress Expectations</p><ul style="list-style-type: none">• Be very clear and upfront about program's expectations• What are you asking?<ul style="list-style-type: none">– That they complete CERT Basic Training?– That they build a local team?– That they help coordinate the local CERT program?– That they participate in other non-disaster activities?<p>CERT Program Manager: Working With Volunteers 4-15</p></div> <p>Display Slide 4-15</p> 	

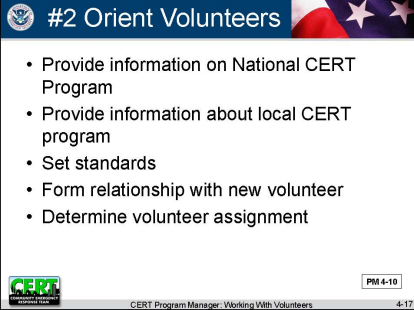
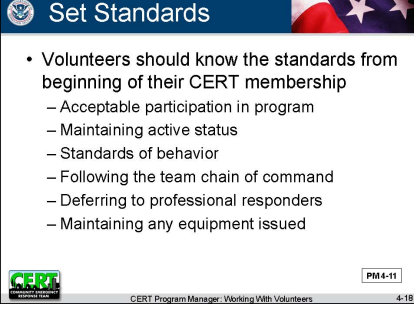
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>The slide shows the title 'Draft Program Plan: Identify Recruitment Options' with a 'CERT' logo and 'PM 4-10' in the bottom right corner.</p> <p>Display Slide 4-16</p>	<p>Exercise: Draft Program Plan: Identify Recruitment Options</p> <p>Purpose: This exercise allows Program Managers to identify avenues they would like to pursue for recruitment. It also allows them to record thoughts they have for recruitment messages.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the first table of the fourth section, <i>Working with Volunteers</i> (p. 1-16), individually. <p>Debrief: Remind participants to always be alert for new possibilities for recruitment and to add them to the Program Plan.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>#2 Orient Volunteers</p> <ul style="list-style-type: none">• Provide information on National CERT Program• Provide information about local CERT program• Set standards• Form relationship with new volunteer• Determine volunteer assignment <p><small>CERT Program Manager: Working With Volunteers 4-17</small></p> <p>Display Slide 4-17</p>	<h3>#2 Orient Volunteers</h3> <p>Explain that you are now going to discuss the second activity that Program Managers need to do with volunteers. This activity is orientation.</p> <p>Say that every volunteer who completes the <i>CERT Basic Training</i> course and wants to become an active CERT member needs to be oriented. The Program Manager must:</p> <ul style="list-style-type: none">▪ Provide information on the National CERT Program (covered in <i>CERT Basic Training</i>).▪ Provide information about the local CERT program (probably will have been covered in <i>CERT Basic Training</i>).▪ Set standards.▪ Form a relationship with new volunteer.▪ Determine what his or her volunteer assignment(s) will be.
 <p>Set Standards</p> <ul style="list-style-type: none">• Volunteers should know the standards from beginning of their CERT membership<ul style="list-style-type: none">– Acceptable participation in program– Maintaining active status– Standards of behavior– Following the team chain of command– Deferring to professional responders– Maintaining any equipment issued <p><small>CERT Program Manager: Working With Volunteers 4-18</small></p> <p>Display Slide 4-18</p>	<h3>Set Standards</h3> <p>Say that, in addition to orienting volunteers to the national and local CERT programs, Program Managers must set standards for volunteers from the beginning of their CERT membership. Program Managers can develop a standard operating guide for new members that includes all of the expectations, such as:</p> <ul style="list-style-type: none">▪ Acceptable participation in the program▪ Maintaining active status▪ Standards of behavior▪ Following the team chain of command▪ Deferring to professional responders▪ Maintaining any equipment issued

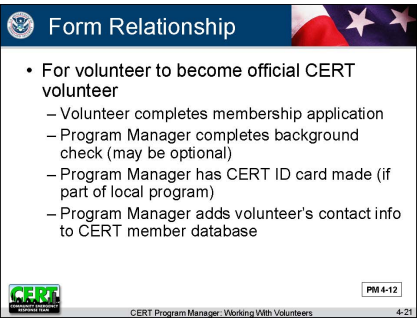
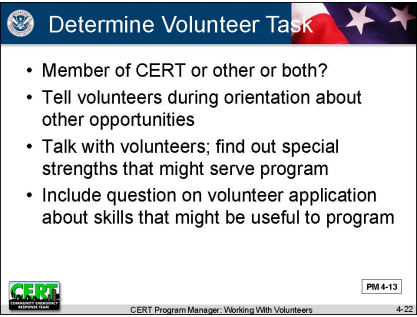
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p>Behavior is important!</p> <ul style="list-style-type: none">• Volunteer behavior determines how program viewed by emergency responders, public officials, and community members<ul style="list-style-type: none">– Negative incidents can bring down program <p><small>CERT Program Manager: Working With Volunteers 4-19</small></p>	<p>Stress that volunteer behavior determines how emergency responders, public officials, and community members will view the local program. It only takes a few negative incidents to bring down the entire credibility of a local CERT program and the program's reputation for training and maintaining volunteers.</p>
<p>Display Slide 4-19</p> <p>Perception of Volunteers</p> <ul style="list-style-type: none">• Some officials concerned about volunteers working without supervision• Team must be viewed as competent group of trained volunteers who:<ul style="list-style-type: none">– Diligently follow directions from chain of command– Provide valuable support for professional response efforts <p><small>CERT Program Manager: Working With Volunteers 4-20</small></p>	<p>Tell participants that some officials are concerned about volunteers being trained for and performing emergency response without direction. Emphasize the importance of CERT quality control and credibility of citizen volunteers.</p> <ul style="list-style-type: none">▪ Program Managers should make sure their team is viewed as a competent group of trained volunteers who diligently follow directions from their chain of command and provide valuable support for professional response efforts.▪ A team that behaves by accepted CERT standards will be respected and called upon more often when needs in the community arise.

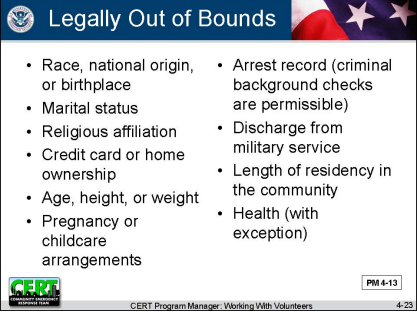
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 352 605 667"><p>Form Relationship</p><ul style="list-style-type: none">• For volunteer to become official CERT volunteer<ul style="list-style-type: none">– Volunteer completes membership application– Program Manager completes background check (may be optional)– Program Manager has CERT ID card made (if part of local program)– Program Manager adds volunteer's contact info to CERT member database<p><small>CERT Program Manager: Working With Volunteers 4-21</small></p></div> <p data-bbox="191 682 462 724">Display Slide 4-21</p> <p data-bbox="191 1144 535 1186">PM, Additional Materials</p> <div data-bbox="191 1281 605 1596"><p>Determine Volunteer Task</p><ul style="list-style-type: none">• Member of CERT or other or both?• Tell volunteers during orientation about other opportunities• Talk with volunteers; find out special strengths that might serve program• Include question on volunteer application about skills that might be useful to program<p><small>CERT Program Manager: Working With Volunteers 4-22</small></p></div> <p data-bbox="191 1606 462 1648">Display Slide 4-22</p>	<h3 data-bbox="630 357 1226 394">Form a Relationship with the Volunteer</h3> <p data-bbox="630 409 1421 483">Explain that, for a volunteer to become an official CERT volunteer, the following must occur:</p> <ul data-bbox="630 493 1445 1113" style="list-style-type: none">▪ The volunteer completes a membership application. By signing the CERT membership form the volunteer is committing to the CERT program, its requirements, and to the Program Manager as the leader of the program.▪ The Program Manager completes a background check on the volunteer (this may be optional, depending on the governing agency of the CERT program).▪ The Program Manager has a CERT identification card made (if this is part of the local program).▪ The Program Manager adds the volunteer's name, address, e-mail address, phone number and any other information needed in the local CERT member database. <p data-bbox="630 1144 1445 1249">Refer participants to the <i>Sample Membership Application</i> at the end of Unit 4 in the Participant Manual and in the Instructor Guide.</p> <h3 data-bbox="630 1281 1120 1318">Determine the Volunteer's Work</h3> <p data-bbox="630 1333 1445 1522">Explain that the last part of orientation is for the Program Manager to find out how the volunteer wants to work with the CERT program. Most volunteers will want to be part of a CERT. However, some volunteers at some point may also want to contribute in other ways.</p> <ul data-bbox="630 1533 1437 1701" style="list-style-type: none">▪ A CERT volunteer who knows accounting may be able to help the Program Manager with bookkeeping.▪ A CERT volunteer with graphic design experience may be able to design flyers. <p data-bbox="630 1711 1388 1785">Get to know your volunteers so you don't miss out on these opportunities!</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

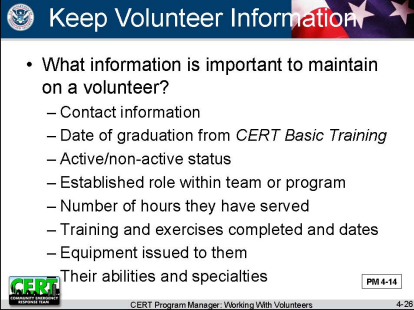
UNIT 4: WORKING WITH VOLUNTEERS

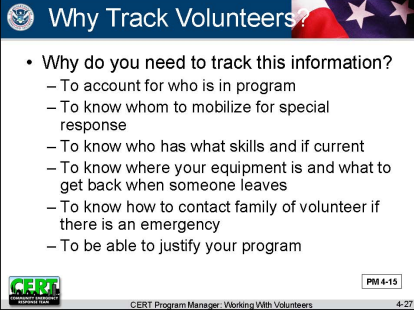
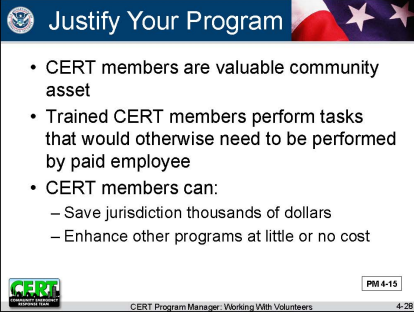
INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-23</p>	<p>Provide these suggestions for making the best use of CERT volunteers:</p> <ul style="list-style-type: none">▪ Tell volunteers during orientation about other opportunities.▪ Talk with volunteers and find out their special strengths that might serve the CERT program.▪ Include a question on the volunteer application about skills they have that might be useful to the program. <p>Questions You CAN'T Ask</p> <p>Explain there are a number of questions that legally you may <i>not</i> ask in an interview situation. These include questions about:</p> <ul style="list-style-type: none">▪ Race, national origin, or birthplace▪ Marital status▪ Religious affiliation▪ Credit card or home ownership▪ Age, height, or weight▪ Pregnancy or childcare arrangements▪ Arrest record (but criminal background checks are permissible)▪ Discharge from military service▪ Length of residency in the community▪ Health. The exception is a specific question about whether the applicant is able to perform a specific physical task required by the job (e.g., lift 50 lbs.). <p>A general guideline: don't ask anything that is not directly related to the ability of the applicant to perform the specific volunteer job.</p>

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 394"> Make Orientation Fun</p>  <p data-bbox="191 632 602 667"> CERT Program Manager: Working With Volunteers PM 4-14 4-24</p> <p data-bbox="191 684 461 720">Display Slide 4-24</p>  <p data-bbox="191 909 602 945"> #3 Track Volunteers</p>  <p data-bbox="191 1188 602 1224"> CERT Program Manager: Working With Volunteers PM 4-14 4-25</p> <p data-bbox="191 1241 461 1276">Display Slide 4-25</p>	<p data-bbox="630 359 878 394">A Final Thought</p> <p data-bbox="630 411 1438 590">Tell participants to consider making the orientation part of a fun activity, e.g., a potluck dinner for new volunteers. Such an event sets a welcoming tone and gives the new volunteers a social opportunity to meet other volunteers informally.</p> <p data-bbox="630 751 1433 827">Do experienced Program Managers have anything to add about orientation?</p> <p data-bbox="630 909 987 945">#3 Track Volunteers</p> <p data-bbox="630 968 1346 1077">Explain that you are now going to discuss the third activity that Program Managers need to do with volunteers. This activity is tracking.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

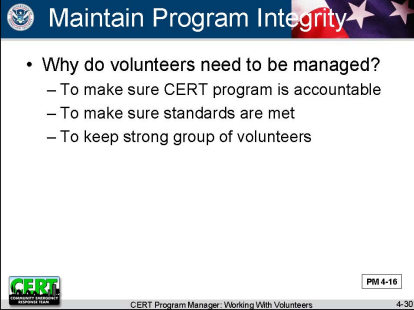


INSTRUCTOR GUIDANCE	CONTENT
 <p>Keep Volunteer Information</p> <ul style="list-style-type: none">• What information is important to maintain on a volunteer?<ul style="list-style-type: none">– Contact information– Date of graduation from <i>CERT Basic Training</i>– Active/non-active status– Established role within team or program– Number of hours they have served– Training and exercises completed and dates– Equipment issued to them– Their abilities and specialties <p>Display Slide 4-26</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<h3>What Information to Collect and Why</h3> <p>Ask participants:</p> <h4>What information is important to maintain on a volunteer?</h4> <p>Summarize the discussion by listing some of the information you maintain on volunteers:</p> <ul style="list-style-type: none">▪ Contact information▪ Date of graduation from <i>CERT Basic Training</i>▪ Active/non-active status▪ Established role within team or program▪ Number of hours they have served▪ Supplemental training and exercises they complete and completion dates▪ Equipment issued to them▪ Their abilities and specialties <p>If the program is sponsored by the fire department, it is good to know where volunteers are located by Fire Management Area (FMA). If it is sponsored by the police department, is good to know where volunteers live by precinct. This will allow the Program Manager to respond to requests for volunteer locations (ID by departments' operational subdivisions).</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>Why Track Volunteers</p> <ul style="list-style-type: none"> • Why do you need to track this information? <ul style="list-style-type: none"> – To account for who is in program – To know whom to mobilize for special response – To know who has what skills and if current – To know where your equipment is and what to get back when someone leaves – To know how to contact family of volunteer if there is an emergency – To be able to justify your program <p>Display Slide 4-27</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask participants:</p> <p>Why do you need to track this information?</p> <p>Summarize the discussion by listing various ways that the information is used:</p> <ul style="list-style-type: none"> ▪ Need to account for who is in the program ▪ Need to know whom to mobilize for special response situations (e.g., someone trained in animal response) ▪ Need to know who has what skills and if they are current ▪ Need to know where your equipment is and know what to get back when someone leaves ▪ Need to know how to contact the family of the volunteer if there is an emergency ▪ Need to be able to justify your program to funders, to show what service you are providing to the community; hours count toward the state filing for reimbursement after a disaster
 <p>Justify Your Program</p> <ul style="list-style-type: none"> • CERT members are valuable community asset • Trained CERT members perform tasks that would otherwise need to be performed by paid employee • CERT members can: <ul style="list-style-type: none"> – Save jurisdiction thousands of dollars – Enhance other programs at little or no cost <p>Display Slide 4-28</p> <p>Refer participants to the example in the Participant Manual.</p>	<p>Justify Your Program</p> <p>Explain that CERT volunteers dedicate their time and energy to learning how to serve their community, and once they are trained they become a valuable community asset. Trained CERT members perform the tasks that would otherwise need to be performed by a paid police officer, fire fighter, or other employee. In this way CERT members can save a jurisdiction thousands of dollars or enhance other programs at little or no cost.</p> <p>Give this example:</p> <p>“In the past year the CERT program supplemented the response capability of this community by providing x number of people hours for disaster response and x number of people hours providing traffic and crowd management at community events. This service would have cost this community \$x if paid responders had been used.”</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="188 541 269 613" data-label="Image"> </div> <div data-bbox="188 688 604 1003" data-label="Image"> </div> <p data-bbox="188 1018 461 1054">Display Slide 4-29</p>	<p data-bbox="631 359 1364 499">Tell participants that tracking volunteers will also be addressed in Unit 6, Procuring and Managing Resources. The key message here is that the information must be collected and maintained.</p> <p data-bbox="631 535 1435 606">Do experienced Program Managers have anything to add about tracking?</p> <p data-bbox="631 693 1026 732"><i>#4 Manage Volunteers</i></p> <p data-bbox="631 751 1365 858">Explain that you are now going to discuss the fourth activity that Program Managers need to do with volunteers. This activity is managing them.</p> <p data-bbox="631 1087 1446 1228">Tell participants that the management tasks for volunteers are similar to those used when managing paid staff. Just as staff members need to be managed, so too do volunteers. The management tasks are:</p> <ul data-bbox="631 1251 1446 1621" style="list-style-type: none"> ▪ Training: making sure volunteers have the skills to do the task ▪ Assigning: telling them what the task is and providing them the information they need to do the task ▪ Monitoring: supervising the task and intervening when necessary ▪ Evaluating: providing feedback after the event; checking on volunteers' well-being; debriefing with volunteers <p data-bbox="631 1661 1398 1837">Explain that, during CERT activation, some of the management tasks are done at the team level. The Program Manager will not be able to provide all the management personally. But he or she has general responsibility for seeing that the management is done.</p>


COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Maintain Program Integrity</p> <ul style="list-style-type: none">• Why do volunteers need to be managed?<ul style="list-style-type: none">– To make sure CERT program is accountable– To make sure standards are met– To keep strong group of volunteers <p>Display Slide 4-30</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask participants:</p> <p>Why do volunteers need to be managed?</p> <p>Summarize the discussion about why volunteers need to be managed:</p> <ul style="list-style-type: none">▪ To be accepted as a part of the community's emergency response system, the CERT program must be accountable. It only takes a few bad apples to bring down the program.▪ The program sets expectations and it has to see that the expectations are met.▪ The program cannot survive without volunteers. It needs to work to keep them.
 <p>Management Challenges</p> <ul style="list-style-type: none">• Managing volunteers is different from managing staff<ul style="list-style-type: none">– Volunteers can leave without warning– One or more unhappy volunteers can be quite damaging  <p>Display Slide 4-31</p>	<p>Explain that managing volunteers is different from managing staff. It is often much more delicate since volunteers can leave without warning and one or more unhappy volunteers can be quite damaging to the reputation of the program and hard work put forth by other members of the team.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 394"> Management Challenges (continued)</p> <ul data-bbox="212 415 558 548" style="list-style-type: none">• Program Manager tasks<ul style="list-style-type: none">– Keep volunteers happy about being part of CERT program– Sustain their commitment, their skills as individuals, and their capabilities as a team• It takes time!  <p data-bbox="191 632 602 667"> CERT Program Manager: Working With Volunteers 4-32</p> <p data-bbox="191 684 461 720">Display Slide 4-32</p> <p data-bbox="191 751 602 787"> Exercise</p> <p data-bbox="289 888 505 911">Managing a CERT Event</p> <p data-bbox="191 1024 602 1060"> CERT Program Manager: Working With Volunteers 4-33</p> <p data-bbox="191 1077 461 1113">Display Slide 4-33</p> <p data-bbox="191 1129 358 1165">PM, P. 4-18</p> <p data-bbox="191 1549 597 1661">During the report out, ask for additional thoughts from other small groups.</p>	<p data-bbox="634 359 1182 394">Say that a Program Manager needs to:</p> <ul data-bbox="634 415 1430 569" style="list-style-type: none">▪ Keep volunteers happy about being part of the CERT program▪ Sustain their commitment, their skills as individuals, and their capabilities as a team <p data-bbox="634 590 1430 659">Emphasize that this effort takes time and cannot be ignored because other things seem to be more pressing.</p> <p data-bbox="634 751 1162 787">Exercise: Managing a CERT Event</p> <p data-bbox="634 808 1398 911">Purpose: This exercise breaks participants into small groups to strategize management tasks for various scenarios.</p> <p data-bbox="634 932 1377 1001">Instructions: Follow the steps below to conduct the exercise.</p> <ol data-bbox="634 1022 1425 1604" style="list-style-type: none">1. Divide the class into five small groups.2. Assign a different scenario to each small group.3. Refer participants to the <i>Managing a CERT Event</i> in the Participant Manual and on the following page in the Instructor Guide.4. Review the instructions:<ol data-bbox="688 1304 1425 1604" style="list-style-type: none">a. Strategize how you would manage the event assigned to your small group.b. You can assume that the volunteers are trained. Address assignment, monitoring, and post-event evaluation and feedback.c. You have 10 minutes.d. You will report your plan to the whole group. <p data-bbox="634 1692 1403 1795">Debrief: Compliment the small groups on their work. Remind participants that the post-event evaluation is a two-way event with everyone providing feedback.</p>

PM, P. 4-18	Managing a CERT Event
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Scenarios

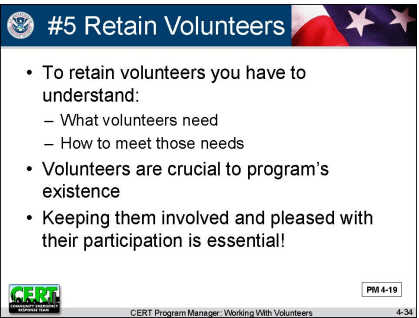
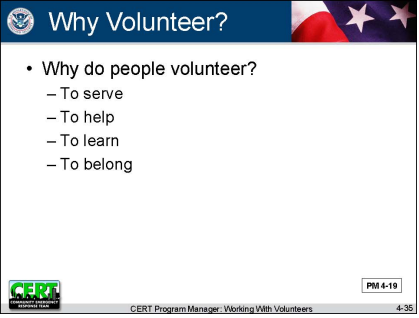
1. The annual county fair is being held in a month. Your CERT program has been asked to assist with parking and traffic.
2. Major flooding is possible in a neighboring community. Your CERT program has been asked to assist with sandbagging.
3. Your CERT program has been asked to help with installing smoke detectors in three apartment buildings that primarily house low-income elderly residents.
4. The local police department is searching for a missing man. They need to search over land and water and the search area is larger than they can cover. They have requested assistance.
5. Severe storms have swept through the area and the command center is overwhelmed with calls and with data that need to be entered. They have asked for help from the CERT program.

Instructions:

1. Strategize how you would manage the event assigned to your small group.
2. You can assume that the volunteers are trained. Address assignment, monitoring, and post-event evaluation and feedback.
3. You have 10 minutes.
4. You will report your plan to the whole group.

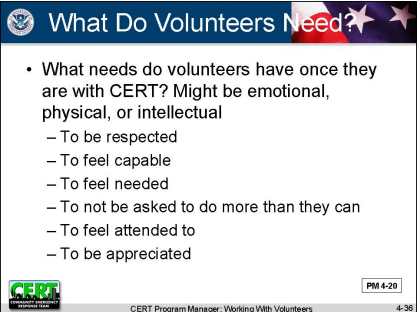
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>#5 Retain Volunteers</p> <ul style="list-style-type: none">• To retain volunteers you have to understand:<ul style="list-style-type: none">– What volunteers need– How to meet those needs• Volunteers are crucial to program's existence• Keeping them involved and pleased with their participation is essential! <p>CERT Program Manager: Working With Volunteers 4-34</p> <p>Display Slide 4-34</p>  <p>Why Volunteer?</p> <ul style="list-style-type: none">• Why do people volunteer?<ul style="list-style-type: none">– To serve– To help– To learn– To belong <p>CERT Program Manager: Working With Volunteers 4-35</p> <p>Display Slide 4-35</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>#5 Retain Volunteers</p> <p>Explain that you are now going to discuss the final activity that Program Managers need to do with volunteers. This activity is retaining them. To retain a volunteer you have to understand what volunteers need and how to meet those needs.</p> <p>Remind participants that you spoke earlier about how crucial volunteers are to the existence of the program. Keeping them involved and pleased with their participation is essential.</p> <p>Volunteer Needs</p> <p>Say that a Program Manager needs to understand a volunteer's motivations. This will make it easier to support them and helps assure that they feel good about making contributions to the program.</p> <p>Ask participants:</p> <p>Why do people volunteer?</p> <p>Summarize the discussion by reviewing why people volunteer:</p> <ul style="list-style-type: none">▪ To serve (to be part something bigger than themselves that also affects them)▪ To help (the spirit of altruism – the desire to give or help – is a strong motivator for many)▪ To learn (especially to learn something that they see as valuable)▪ To belong (to a group or organization that has like beliefs or interests)

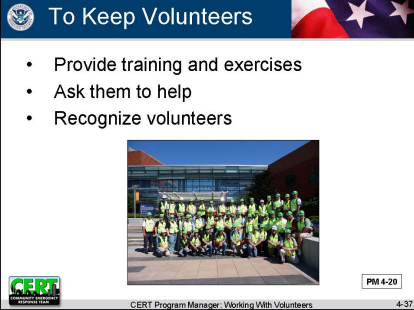
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-36</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Explain that understanding why people volunteer is important, but it is only part of the equation. It explains what got them to CERT.</p> <p>Say that Program Managers also need to understand what volunteers need. This is often hard for volunteers to articulate, but addressing needs is what will get volunteers to stay.</p> <p>Ask participants:</p> <p>What needs do volunteers have once they are with CERT? These needs might be emotional, physical, or intellectual.</p> <p>Summarize the discussion by reviewing the list of needs that volunteers have:</p> <ul style="list-style-type: none">▪ To be respected (for their skills and what they have to offer)▪ To feel capable (to do the job)▪ To feel needed (that their presence makes a difference)▪ To not be asked to do more than they can (acknowledgement of any physical or other limitations)▪ To feel attended to (that someone cares how they are doing or feeling)▪ To be appreciated (a simple thank you goes a long way)

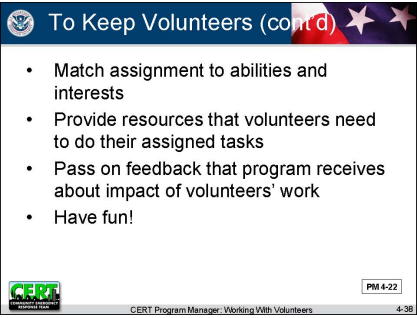
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

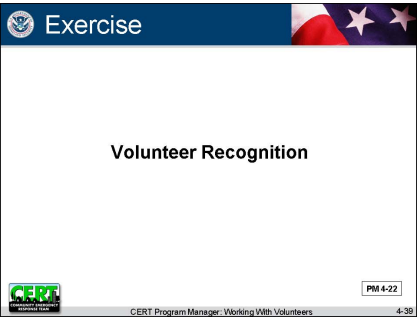
UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 394">The slide is titled "To Keep Volunteers" and features a blue header with a white star. Below the header, there is a bulleted list: "Provide training and exercises", "Ask them to help", and "Recognize volunteers". A photograph shows a group of people in green vests standing in front of a building. The slide includes a "CERT" logo in the bottom left, the text "CERT Program Manager: Working With Volunteers" at the bottom, and a small box with "PM 4-20" and "4-37" in the bottom right.</p> <p data-bbox="191 682 461 718">Display Slide 4-37</p>	<h3 data-bbox="634 359 932 394">Keeping Volunteers</h3> <p data-bbox="634 411 1442 516">Explain that one part of retention is providing training and exercises to make sure that the volunteers' skills are maintained.</p> <ul data-bbox="634 537 1409 659" style="list-style-type: none">▪ Volunteers with rusty skills will feel uncertain and perform poorly.▪ Unqualified volunteers are a liability to the program. <p data-bbox="634 751 1442 930">Explain that <i>CERT Basic Training</i>, supplemental training, and drill/exercises are all important ways to retain volunteers. More information about these will be provided later in the course as part of Unit 7, Training and Exercises.</p> <p data-bbox="634 968 1409 1073">Say that another critical part of volunteer retention is to ask them to help as often as possible. This will help volunteers feel respected, capable, and needed.</p> <ul data-bbox="634 1094 1442 1625" style="list-style-type: none">▪ Don't wait for an emergency; CERT members can help in non-emergency situations, too.▪ Examples of non-emergency activities include:<ul data-bbox="683 1234 1442 1499" style="list-style-type: none">• Assistance with crowd/traffic management at large community events• Presentations about community preparedness• Helping with smoke detector installation campaigns• Etc.▪ Non-emergency uses of CERT volunteers build political support and create "political capital" for the program.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-38</p>	<p>Say that another part of retention is finding ways to recognize the volunteers. Whatever the method of recognition, to be effective it must be:</p> <ul style="list-style-type: none">▪ Sincere▪ Ongoing▪ Inclusive of <i>all</i> volunteers▪ Varied (both formal and informal)▪ Meaningful to the individual <p>Finally, describe some other ways to increase volunteer satisfaction, including the following:</p> <ul style="list-style-type: none">▪ Ensure that the assignment is a good match for the person's abilities and interests.▪ Make sure that volunteers have the resources they need to do their assigned tasks.▪ Pass on to volunteers the feedback the program receives about the impact of their work.▪ Have fun!

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-39</p> <p>PM, P. 4-23</p>	<p>Exercise: Volunteer Recognition</p> <p>Purpose: This exercise breaks participants into small groups to design volunteer recognition opportunities.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Divide the class into four small groups. Make sure that there is at least one experienced Program Manager in each group. 2. Make assignments as follows: <ul style="list-style-type: none"> Group #1: Design a formal volunteer recognition event that a CERT program could do. Group #2: List 8-10 small, informal things a program can do to retain volunteers. Group #3: Develop a plan to communicate with volunteers. List what kinds of things you will communicate and 3-5 ways that you could communicate them. Group #4: Design an informal and social volunteer recognition event that a CERT program could do. 3. Refer participants to <i>Volunteer Recognition</i> in the Participant Manual and on the following page in the Instructor Guide. 4. Review the instructions: <ul style="list-style-type: none"> ▪ Work on your assignment. ▪ Remember that funding may be tight. Be creative! ▪ You have 10 minutes. ▪ You will report to the whole group. <p>Debrief: Compliment the small groups on their work. Remind participants to include sponsors and appointed and elected officials in their recognition events. This keeps the CERT program visible to them and it makes the volunteers feel special.</p>

PM, P. 4-23	Volunteer Recognition
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Assignments

Group #1: Design a formal volunteer recognition event that a CERT program could do.

Group #2: List 8-10 small, informal things a program can do to retain volunteers.

Group #3: Develop a plan to communicate with volunteers. List what kinds of things you will communicate and 3-5 ways that you could communicate them.


Group #4: Design an informal and social volunteer recognition event that a CERT program could do.

Instructions:

- Work on your assignment.
- Remember that funding may be tight. Be creative!
- You have 10 minutes.
- You will report to the whole group.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="136 359 532 659"></p> <p data-bbox="136 674 402 709">Display Slide 4-40</p> <p data-bbox="136 743 302 779">PM, P. 4-24</p>	<p data-bbox="565 359 948 394">Meetings with Volunteers</p> <p data-bbox="565 411 1393 554">Tell participants that one built-in event that CERT programs have is the periodic volunteer meeting. It can be used for many volunteer activities: training, recognition, and socializing.</p> <p data-bbox="565 743 1318 848">Refer participants to <i>Making Meetings Valuable</i> in the Participant Manual and on the following page in the Instructor Guide.</p>

PM, P. 4-24	Making Meetings Valuable
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Making Meetings Valuable

Have a Reason to Meet

Always have a reason or objective for your meeting. Don't have a meeting just because you think you need one. Have an objective for every meeting and accomplish that objective. This will make participants feel the meeting has a meaning and you will focus on the objective as an accomplishment.

Set an Agenda

Having an agenda is essential for an effective and productive meeting. Make sure that all of your meetings have a printed agenda. This will make the meeting more efficient and make the participants feel like the meeting is not a waste of their time. Adults abhor feeling like they are wasting their time and this will help you stay on task and on time.

Have Fun

Make the meetings fun! Try to add some element that is interesting, stimulating, and fun. How about a game of disaster Jeopardy or 20 Questions? Try anything to make them enjoy the meeting and entice them to come back to the next event.

Keep It Short

Adults HATE wasting time and effort. Keep your meetings short and to the point. An agenda and an objective or two will help, but you need to always be aware of brevity. Stay on task and, if you get done early, thank them and let them go home! Unless you are doing some major training or exercise, avoid going more than 2 hours.

Offer Food and Drinks

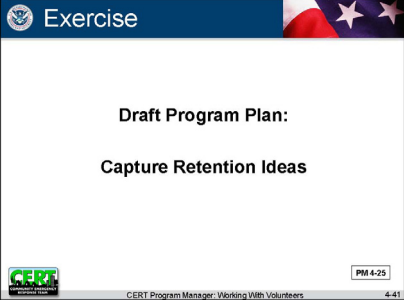

Try to provide your participants some sort of refreshment during meetings. Even if it is nothing more than a soda or bottled water, refreshments are necessary. If you are having an outdoor activity or an exercise, it is imperative to provide liquid refreshments. Consider giving healthy food choices instead of donuts and coffee.

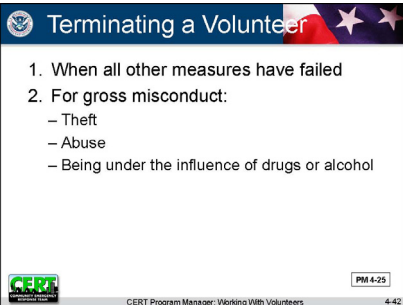
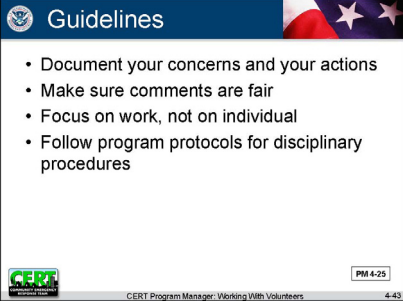

Expand Their Training

Expanding beyond the initial *CERT Basic Training* course is an easy way to keep CERT members interested and motivated to stay with your program. It is also a great way to expand your capacity and capabilities.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE



UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 4-41</p> 	<p>Exercise: Draft Program Plan: Capture Retention Ideas</p> <p>Purpose: This exercise allows Program Managers to capture ideas they have about ways to retain volunteers.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the second part of the fourth section individually. This would be <i>Working with Volunteers, Retention</i>. <p>Debrief: Remind participants to jot down any other ideas they have as the course progresses.</p> <p>Do experienced Program Managers have anything to add about volunteer retention?</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>1. When all other measures have failed</p> <p>2. For gross misconduct:</p> <ul style="list-style-type: none">- Theft- Abuse- Being under the influence of drugs or alcohol <p><small>CERT Program Manager: Working With Volunteers 4-42</small></p>	<h3><i>Terminate a Volunteer</i></h3> <p>Say that the flip side of retaining a volunteer is terminating a volunteer. Termination should be reserved for those times when:</p> <ul style="list-style-type: none">▪ All other measures have failed.▪ There has been gross misconduct such as theft, abuse, or being under the influence of drugs or alcohol.
<p>Display Slide 4-42</p>	<p>Explain that, during the orientation session, volunteers should be made aware of the disciplinary policy and the possibility of termination if they do not meet the expectations and standards set by the program. Terminations are rare but they do happen. The hope is that through regular evaluations and feedback such situations can be avoided.</p>
 <p>Guidelines</p> <ul style="list-style-type: none">• Document your concerns and your actions• Make sure comments are fair• Focus on work, not on individual• Follow program protocols for disciplinary procedures <p><small>CERT Program Manager: Working With Volunteers 4-43</small></p>	<p>Provide some guidelines for Program Managers should they have a situation that causes concern:</p> <ul style="list-style-type: none">▪ Document your concerns and your actions.▪ Make sure your comments are factual.▪ Focus on the work, not on the individual.▪ Follow program protocols for disciplinary procedures. Levels of corrective action should be included in the protocol, e.g.:
<p>Display Slide 4-43</p> 	<ul style="list-style-type: none">• Additional training or supervision• Reassignment• Suspension• Termination <p>Do experienced Program Managers have anything to add about strategies they have used when terminating a volunteer?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 630 401"> Unit Summary</p> <ul data-bbox="215 415 565 632" style="list-style-type: none">• The Program Manager and the CERT Volunteer• Recruit Volunteers• Orient Volunteers• Track Volunteers• Manage Volunteers• Retain Volunteers• Terminate a Volunteer <p data-bbox="191 646 630 688"> PM 4-26 CERT Program Manager: Working With Volunteers 4-44</p> <p data-bbox="191 701 461 737">Display Slide 4-44</p> <p data-bbox="191 947 269 1016"></p>	<p data-bbox="659 359 912 401">Unit Summary</p> <p data-bbox="659 415 1446 485">Tell participants that this unit has looked at working with volunteers:</p> <ul data-bbox="659 506 1386 852" style="list-style-type: none">▪ The Program Manager and the CERT Volunteer▪ Recruit Volunteers▪ Orient Volunteers▪ Track Volunteers▪ Manage Volunteers▪ Retain Volunteers▪ Terminate a Volunteer <p data-bbox="659 940 1442 1010">Do you have any questions about anything covered in this unit?</p> <p data-bbox="659 1098 813 1134">Transition</p> <p data-bbox="659 1150 1458 1220">The next unit will discuss how to work with instructors for your program.</p>

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Additional Materials

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

PM, P. 4-28 to 4-33	Sample Membership Application
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**Grand Island-Hall County
Community Emergency Response
Team (CERT)
Membership Application**



Return to:
Grand Island-Hall County Emergency Management
CERT Program
100 East 1st Street
Grand Island, NE 68801

Name: _____
Last First MI

Address: _____

City/State/Zip: _____

Work Address: _____

Are you currently employed? If so, how? _____

Your Home Phone: _____ Work Phone: _____

Cellular Phone: _____ Pager: _____

Do you have an alternate way of contacting you? (i.e., fax, email):

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

Date of Birth: _____ Legal adult ? Yes No

Do you have any physical or medical conditions that might affect your participation in some of the activities of this program? Please explain:

Personal References:

Name	Complete Address	Phone	Relationship

CERT Basic Training

Completion Date: _____ Location: _____

Sponsoring Organization: _____

INTENT/AUTHORIZATION TO OBTAIN BACKGROUND REPORT FOR CERT VOLUNTEERING

NOTICE

The City of Grand Island conducts applicant screening and criminal background efforts that include an investigative report, which may include inquiries into an applicant's character, general reputation, personal characteristics, and mode of living. The report may involve personal interviews with employers and educational institutions. Additionally, a criminal and civil records history, driver history, educational verification, and work history may be ordered. A volunteer has the right to request a complete and accurate disclosure of the nature and scope of the investigative report requested. Your request must be made in writing within a reasonable amount of time from the receipt of this notice. You also may have additional rights according to state and local laws.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

AUTHORIZATION

I hereby certify that I have been informed as to the duties of the volunteer position for which I am applying. Furthermore, I certify that the information I have thus far provided to the City of Grand Island is accurate and complete, to the best of my knowledge. I understand that falsification, misrepresentation or omission of any material or information I have supplied may be used to disqualify me from CERT membership. I understand that the City of Grand Island will verify information given on applications, and I authorize it to do so. I also authorize the City of Grand Island and/or its agents, to make whatever inquiries it considers appropriate in order to obtain this verification. I authorize any individuals and/or agencies contacted by the City of Grand Island or its agents to furnish all necessary information that may be requested, including consumer credit and/or investigative consumer reports. I release the City of Grand Island, its agents and any person or institution that provides the City of Grand Island with information pertaining to this application, from any and all liability for adverse action or damage that may result from the investigation, disclosure, or use of such information. This authorization shall remain in effect during the course of participation in CERT and may be used in connection with future decisions concerning my involvement in CERT.

I have read and understand the above notice and I hereby authorize the obtaining and disclosure of such information.

Applicant's Printed Name: _____ DOB: _____

Applicant's Signature: _____ Date: _____

NOTE: AN ARREST MAY NOT AUTOMATICALLY PROHIBIT ACCEPTANCE INTO A VOLUNTEER POSITION.

Arrest Information

Have you ever been arrested, charged, "questioned as an accused party", or convicted of a felony or misdemeanor, including court martial and military charges? (Omit traffic violations).

Yes ____ No ____ If yes, complete the following.

Police Agency

<u>Crime Charged</u>	<u>City & State</u>	<u>Date</u>	<u>Disposition of Case</u>
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

If conviction, what was the nature of your offense(s)?

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

Date of convictions(s) _____

Are you on Probation/Parole? Yes _____ No _____

Current status of conviction(s) _____

Have you ever been incarcerated in a correctional/detention facility?

1. If yes, give facility name and location. _____
2. Date and length of incarceration. _____
3. Date of release and current status. _____

Signatures

I understand that by volunteering with the CERT organization that I will learn certain basic skills that are intended to help me render assistance to others only when I deem it safe and necessary for me to do so. I am under no obligation, by virtue of having received this training, to render aid or become involved in any activities that would make me feel uncomfortable or have the potential to cause me physical or emotional injury.

I recognize the fact that I will receive a "Certificate of Completion" only upon attending all sessions of this course and completing the final exam and exercise. I understand that any and all equipment issued to me by the Emergency Management Department is property of the City of Grand Island and that I am expected to return it in good condition if I leave the program or area.

By this signature I affirm that I understand that when acting as a CERT volunteer I may only:

1. Act in the scope of my official duties, and
2. Act in furtherance of a public purpose.

I understand that my deviation from the above may result in personal liability. I have also read and agreed to sign the attached Informed Consent form.

Signature

Printed Name

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

INFORMED CONSENT, WAIVER AND RELEASE AGREEMENT

FOR THE HALL COUNTY/GRAND ISLAND CITY COMMUNITY EMERGENCY RESPONSE TEAM

The undersigned, being at least eighteen years of age, and in consideration for acceptance, approval and participation in the Community Emergency Response Team (CERT) Program, sponsored by Hall County, hereinafter referred to as "County" and Grand Island City, a home rule municipality organized under the laws of the State of Nebraska, hereinafter referred to as "City", do hereby agree to this waiver and release.

I recognize that the Community Emergency Response Team (CERT) Program will involve physical labor and may carry a risk of personal injury. I further recognize that there are natural and manmade hazards, environmental conditions, diseases, and other risks, which in combination with my actions can cause injury to me. I hereby agree to assume all risks which may be associated with or may result from my participation in the program, including, but not limited to, transportation to and from volunteer sites, extinguishing small fires, providing disaster medical care, (e.g. controlling bleeding, treating shock, treating sprains and fractures, opening airways, transporting patients, etc.) performing light search and rescue activities (e.g. cribbing and leveraging, victim extrication transportation, etc.) and other similar activities.

I recognize that these program activities will involve physical activity and may cause physical and emotional discomfort. I state that I am free from any known heart, or other serious health problems that could prevent me from participating in any of the activities associated with this program. I further state that I am sufficiently physically fit to participate in the activities of this program.

I certify that I have medical insurance to cover the cost of any emergency or other medical care that I may receive for an illness or injury. I certify that if I do not have medical insurance, I will be personally responsible for the cost of any emergency or other medical care. I agree to hold harmless Hall County and the City of Grand Island, their agencies, departments, officers, employees, agents, and all sponsors and/or officials and staff of any said entity or person, their representatives, agents, affiliates, directors, servants, volunteers, and employees from the cost of any medical care that I receive while participating in this program or as a result of it.

I further agree to release Hall County and the City of Grand Island, their agencies, departments, officers, employees, agents, (entity and persons as appropriate) and all sponsors and/or officials and staff of any said entity or person, their representatives, agents, affiliates, directors, servants, volunteers and employees from any and all liability, claims, demands, actions, and causes of actions whatsoever for any loss claim, damage, injury, illness, attorney's fees or harm of any kind or nature to me arising out of any and all activities associated with the aforementioned activities.

I further agree to hold harmless, and hereby release the above mentioned entities and persons from all liability, negligence, or breach of warranty associated with injuries or damages from any claim by me, my family, estate, heirs, or assigns from or in any way connected with the aforementioned activities.

CONSENT

Consent is expressly given, in the event of injury, for any emergency medical aid, anesthesia, and/or operation, if in the opinion of the attending physician, such treatment is necessary.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 4: WORKING WITH VOLUNTEERS

I HAVE CAREFULLY READ AND UNDERSTAND THE CONTENTS OF THE FOREGOING LANGUAGE AND I SPECIFICALLY INTEND IT TO COVER ANY PARTICIPATION IN THE COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM SPONSORED BY HALL COUNTY AND GRAND ISLAND.

Name: _____ Signature: _____ Date: _____

Witness: _____ Witness Signature _____

UNIT 5: WORKING WITH INSTRUCTORS

In this unit you will learn about:

- **The Program Manager and the CERT Instructor.** The roles of Program Manager and instructor.
- **Recruitment.** How to find and recruit instructors.
- **Orientation.** What you need to learn and what orientation is needed.
- **Tracking.** What information to track and why to track instructors.
- **Management.** The tasks involved in managing instructors.
- **Retention.** The importance of recognizing both paid and volunteer instructors.
- **Termination.** What to do if it is necessary to terminate an instructor.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

- Establish a process for working with instructors.
 - Describe how to recruit instructors.
 - Describe how to orient instructors.
 - Explain why to track instructors.
 - Describe methods for managing instructors.
 - Identify techniques for retaining instructors.
 - Explain what to do when terminating an instructor.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- The Program Manager and the CERT Instructor
- Recruit Instructors
- Orient Instructors
- Track Instructors
- Manage Instructors
- Retain Instructors
- Terminate an Instructor
- Unit Summary

**ESTIMATED
COMPLETION
TIME**

1 hour

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

TRAINING METHODS

The instructor starts by providing an overview of the Program Manager's role with instructors: the types of personnel needed, the importance of instructors to the program's success, the elements of a competent instructor, and the instructor development plan.

Then the instructor conducts a guided discussion about who might be a good instructor for a CERT course. The class reviews factors to consider when recruiting instructors. Participants record recruitment ideas in their Draft Program Plan.

The instructor next discusses orienting instructors. The instructor explains that orientation includes learning about the instructor and providing information to the instructor. The instructor then provides a list of the information to include in orientation to reduce liability and to ensure that the instructor represents the program competently.

Then the instructor briefly addresses tracking instructors: what needs to be tracked and why tracking is important.

Following this, participants and instructor discuss the tasks in managing instructors, training them, monitoring their work, and finally evaluating them and providing feedback.

Next the instructor conducts a short guided discussion on the ways to provide instructor recognition, particularly to volunteer instructors.

Finally, the instructor briefly discusses terminating an instructor.

Throughout the unit participants record ideas in their Draft Program Plan.

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
- *Community Emergency Response Team Program Manager Participant Manual* (for participants)
- PowerPoint slides 5-1 to 5-38

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

EQUIPMENT The following equipment is required for this unit:

- A computer with PowerPoint software
- A computer projector and screen
- Easel pad and easel or whiteboard
- Markers

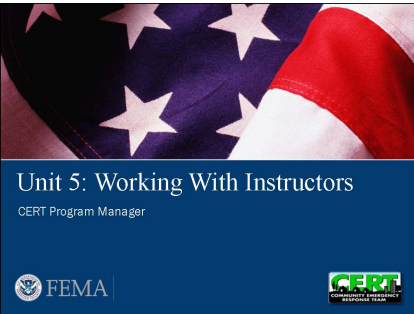
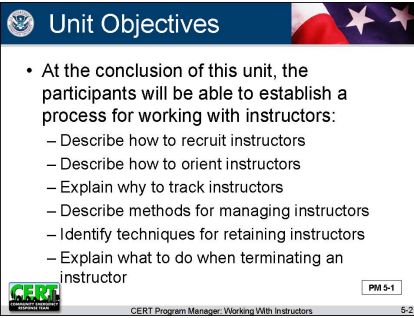
NOTES A suggested time plan for this unit is as follows:

Unit Overview1 minute
The Program Manager and the CERT Instructor..... 15 minutes
#1 Recruit Instructors 8 minutes
Draft Program Plan: Identify Recruitment Options..... 10 minutes
#2 Orient Instructors 10 minutes
#3 Track Instructors1 minute
#4 Manage Instructors 10 minutes
#5 Retain Instructors3 minutes
Terminate an Instructor1 minute
Unit Summary1 minute
Total Time: 1 hour

REMARKS While the initial training offered by a CERT program is the *CERT Basic Training* course, a program will quickly begin offering more training courses. Therefore this unit uses the generic term “CERT course” rather than referring to one particular course.

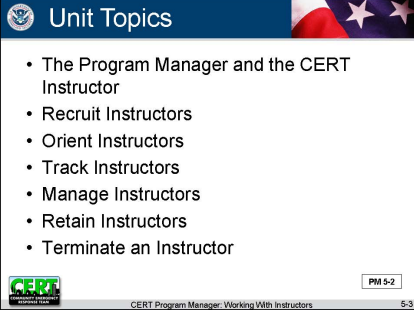
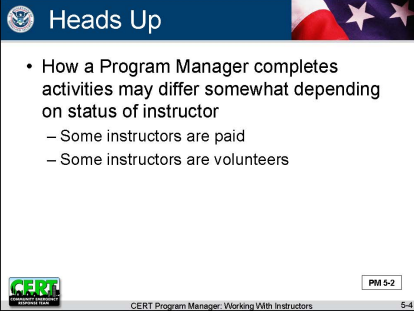


This unit is not about how to deliver *CERT Basic Training*. Remember that the audience for this unit is current and potential Program Managers; it is not CERT instructors. Sections of this unit reflect the content of the CERT Train-the-Trainer course but the emphasis in this unit is on **managing** instructors rather than **training** instructors.

Unit 5: Working with Instructors

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 5-1</p>  <p>Display Slide 5-2</p>	<p>Unit Overview</p> <p>Say that this unit looks at how the Program Manager works with instructors:</p> <ul style="list-style-type: none"> ▪ Recruitment ▪ Orientation ▪ Tracking ▪ Management ▪ Retention ▪ Termination <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to establish a process for working with instructors:</p> <ul style="list-style-type: none"> ▪ Describe how to recruit instructors. ▪ Describe how to orient instructors. ▪ Explain why to track instructors. ▪ Describe methods for managing instructors. ▪ Identify techniques for retaining instructors. ▪ Explain what to do when terminating an instructor.

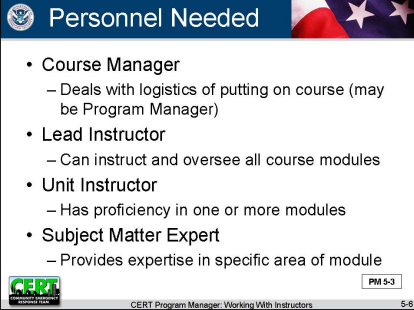
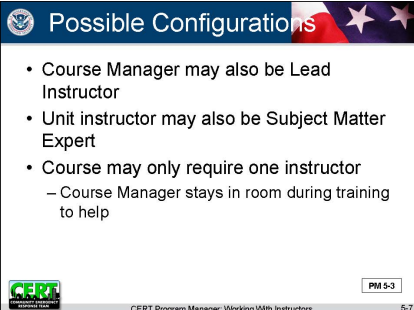
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• The Program Manager and the CERT Instructor• Recruit Instructors• Orient Instructors• Track Instructors• Manage Instructors• Retain Instructors• Terminate an Instructor <p><small>CERT Program Manager: Working With Instructors 5-3</small></p> <p>Display Slide 5-3</p>  <p>Heads Up</p> <ul style="list-style-type: none">• How a Program Manager completes activities may differ somewhat depending on status of instructor<ul style="list-style-type: none">– Some instructors are paid– Some instructors are volunteers <p><small>CERT Program Manager: Working With Instructors 5-4</small></p> <p>Display Slide 5-4</p>	<h3>Unit Topics</h3> <p>Say that the Program Manager does the same tasks with instructors that he or she does with volunteers. Therefore this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ The Program Manager and the CERT Instructor▪ Recruit Instructors▪ Orient Instructors▪ Track Instructors▪ Manage Instructors▪ Retain Instructors▪ Terminate an Instructor <p>Finally, tell participants that, since some instructors will be paid and some will be volunteers, how a Program Manager completes these activities may differ somewhat depending on the circumstance.</p>
 <p>Program Mgr and Instructors</p> <ul style="list-style-type: none">• Think about requirements for CERT instructor:<ul style="list-style-type: none">– Job of instructor– What makes a competent instructor• Consider these requirements when developing instructor deployment plan  <p><small>CERT Program Manager: Working With Instructors 5-5</small></p> <p>Display Slide 5-5</p>	<h3><i>The Program Manager and the CERT Instructor</i></h3> <p>Explain that, before talking about how to work with CERT instructors, it's important to think about the requirements for a CERT instructor:</p> <ul style="list-style-type: none">▪ The job of the instructor▪ What makes a competent instructor <p>Say that a Program Manager needs to consider these requirements when determining how instructors will be used to support the program, called an instructor deployment plan.</p>

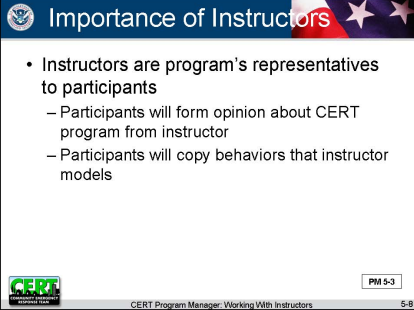
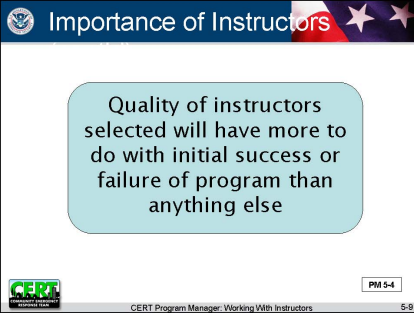
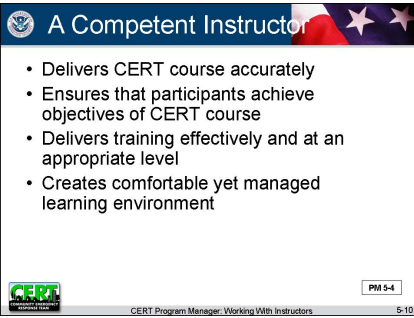
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Personnel Needed</p> <ul style="list-style-type: none">• Course Manager<ul style="list-style-type: none">– Deals with logistics of putting on course (may be Program Manager)• Lead Instructor<ul style="list-style-type: none">– Can instruct and oversee all course modules• Unit Instructor<ul style="list-style-type: none">– Has proficiency in one or more modules• Subject Matter Expert<ul style="list-style-type: none">– Provides expertise in specific area of module <p><small>CERT Program Manager: Working With Instructors 5-6</small></p> <p>Display Slide 5-6</p>  <p>Possible Configurations</p> <ul style="list-style-type: none">• Course Manager may also be Lead Instructor• Unit instructor may also be Subject Matter Expert• Course may only require one instructor<ul style="list-style-type: none">– Course Manager stays in room during training to help <p><small>CERT Program Manager: Working With Instructors 5-7</small></p> <p>Display Slide 5-7</p>	<h3>Types of Personnel Needed</h3> <p>Say that, in order to put on a <i>CERT Basic Training</i> course, the CERT program generally needs these positions filled:</p> <ul style="list-style-type: none">▪ Course Manager – Deals with the logistics of putting on the course (may be the Program Manager)▪ Lead Instructor - Can instruct and oversee all course modules▪ Unit Instructor – Has proficiency in the instruction of one or more specific modules▪ Subject Matter Expert – Provides expertise in a specific area of a module <p>Explain that CERT programs may vary in how they assign the positions:</p> <ul style="list-style-type: none">▪ The Course Manager may also be the Lead Instructor.▪ The Unit Instructor may also be a Subject Matter Expert. <p>Also explain other training courses, e.g., CERT supplemental modules, may be configured differently:</p> <ul style="list-style-type: none">▪ Only one instructor▪ Course Manager, who stays in the room during the training to help

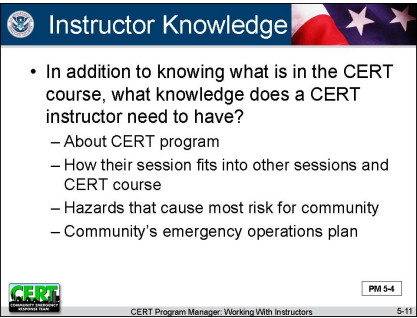
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>• Instructors are program's representatives to participants</p> <ul style="list-style-type: none">– Participants will form opinion about CERT program from instructor– Participants will copy behaviors that instructor models <p>CERT Program Manager: Working With Instructors PM 5-3 5-8</p>	<h3>The Importance of the Instructors</h3> <p>Say that, whatever the configuration, the instructors are the program's representatives to the participants.</p> <ul style="list-style-type: none">▪ Participants will form an opinion about the CERT program from the instructor.▪ Participants will copy the behaviors that the instructor models.
<p>Display Slide 5-8</p>  <p>Quality of instructors selected will have more to do with initial success or failure of program than anything else</p> <p>CERT Program Manager: Working With Instructors PM 5-4 5-9</p>	<p>Stress that the quality of the instructors selected will have more to do with the initial success or failure of the program than anything else.</p> <ul style="list-style-type: none">▪ Participants regularly rate the quality of instruction as more important to meeting their overall learning goals than any other factor.▪ Participants pay attention to the instructors more than to print materials or media.
<p>Display Slide 5-9</p>  <ul style="list-style-type: none">• Delivers CERT course accurately• Ensures that participants achieve objectives of CERT course• Delivers training effectively and at an appropriate level• Creates comfortable yet managed learning environment <p>CERT Program Manager: Working With Instructors PM 5-4 5-10</p>	<h3>A Competent Instructor</h3> <p>Reiterate that a program needs to select the instructor cadre carefully and train them so that they are able to present a training course in a way that relates to the participants.</p> <p>Tell participants that a competent instructor accomplishes the following:</p> <ul style="list-style-type: none">▪ Delivers the CERT course accurately, conveying the messages and intent of the CERT program (e.g., safety, teamwork, place in overall community emergency operations plan)▪ Ensures that participants achieve the objectives of the CERT course
<p>Display Slide 5-10</p>	<p>(continued)</p>

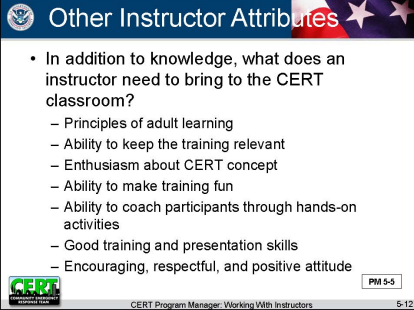
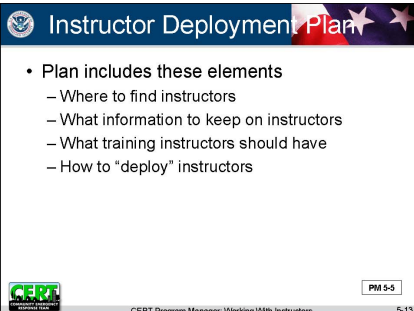
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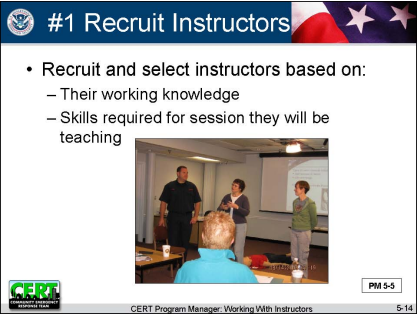
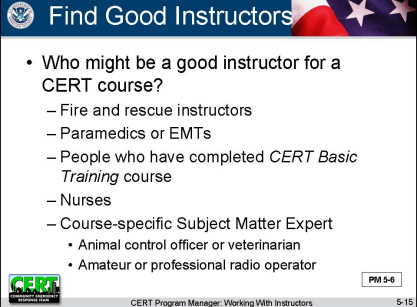
UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 5-11</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<ul style="list-style-type: none">▪ Delivers training effectively and at an appropriate level, thus enabling participants to learn and correctly apply skill sets▪ Creates a comfortable yet managed learning environment <p>Ask participants:</p> <p>In addition to knowing what is in the CERT course, what knowledge does a CERT instructor need to have?</p> <p>Summarize the discussion by listing the things a CERT instructor needs to know:</p> <ul style="list-style-type: none">▪ About the CERT Program▪ How their session fits into the other sessions and the CERT course▪ The hazards that cause the most risk for the community▪ The community's emergency operations plan

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

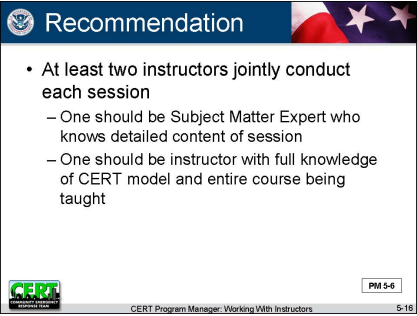
UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Other Instructor Attributes</p> <ul style="list-style-type: none">• In addition to knowledge, what does an instructor need to bring to the CERT classroom?<ul style="list-style-type: none">– Principles of adult learning– Ability to keep the training relevant– Enthusiasm about CERT concept– Ability to make training fun– Ability to coach participants through hands-on activities– Good training and presentation skills– Encouraging, respectful, and positive attitude <p>Display Slide 5-12</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask participants:</p> <p>In addition to knowledge, what does an instructor need to bring to the CERT classroom?</p> <p>Summarize the discussion by listing the things a CERT instructor needs to bring to the classroom:</p> <ul style="list-style-type: none">▪ Principles of adult learning▪ The ability to keep the training relevant▪ Enthusiasm about the CERT concept▪ The ability to make the training fun▪ The ability to coach participants through hands-on activities▪ Good training and presentation skills▪ An encouraging, respectful, and positive attitude
 <p>Instructor Deployment Plan</p> <ul style="list-style-type: none">• Plan includes these elements<ul style="list-style-type: none">– Where to find instructors– What information to keep on instructors– What training instructors should have– How to “deploy” instructors <p>Display Slide 5-13</p>	<p>The Instructor Deployment Plan</p> <p>Explain that, given the requirements that the CERT Program has for its instructors, it is essential that a Program Manager plan how to work with his or her instructors. The instructor deployment plan should address:</p> <ul style="list-style-type: none">▪ Where to find instructors (to be covered in Recruit Instructors)▪ What information to keep on the instructors (to be covered in Orient Instructors)▪ What training the instructors should have (to be covered in Orient Instructors)▪ How to “deploy” the instructors (to be covered in Manage Instructors)

INSTRUCTOR GUIDANCE	CONTENT
	<p>Do experienced Program Managers have anything to add about what has just been covered?</p>
 <p>#1 Recruit Instructors</p> <ul style="list-style-type: none"> Recruit and select instructors based on: <ul style="list-style-type: none"> – Their working knowledge – Skills required for session they will be teaching 	<p>#1 Recruit Instructors</p> <p>Explain that you are now going to look more in depth at each of the activities a Program Manager undertakes when working with instructors. The first thing a Program Manager needs to do is to find instructors.</p> <p>Say that instructors should be recruited and selected to conduct the <i>CERT Basic Training</i> course and other courses based on their working knowledge and the skills required for the session they will be teaching.</p>
<p>Display Slide 5-14</p>	
 <p>Find Good Instructors</p> <ul style="list-style-type: none"> Who might be a good instructor for a CERT course? <ul style="list-style-type: none"> – Fire and rescue instructors – Paramedics or EMTs – People who have completed <i>CERT Basic Training</i> course – Nurses – Course-specific Subject Matter Expert <ul style="list-style-type: none"> • Animal control officer or veterinarian • Amateur or professional radio operator 	<p>Ask participants:</p> <p>Who might be a good instructor for a CERT course?</p> <p>Summarize the discussion by saying that the following people can make good CERT instructors:</p> <ul style="list-style-type: none"> Fire and rescue instructors <ul style="list-style-type: none"> • Particularly for <i>CERT Basic Training</i> Units 2 (Fire Safety) and 5 (Light Search and Rescue Operations) • May also be skilled for <i>CERT Basic Training</i> Units 7 (Disaster Psychology) and 8 (Terrorism and CERT) Paramedics or emergency medical technicians <ul style="list-style-type: none"> • For <i>CERT Basic Training</i> Units 3 (Disaster Medical Operations-Part 1) and 4 (Disaster Medical Operations-Part 2) People who have completed the <i>CERT Basic Training</i> course and have demonstrated they have the skills and expertise to deliver the training <ul style="list-style-type: none"> • For <i>CERT Basic Training</i> Units 1 (Disaster Preparedness) and 6 (CERT Organization)
<p>Display Slide 5-15</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

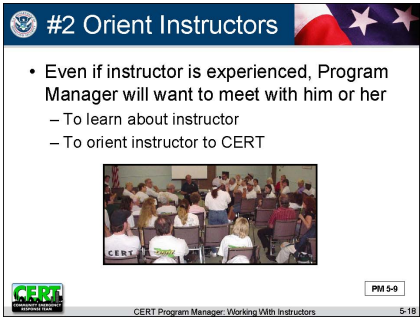
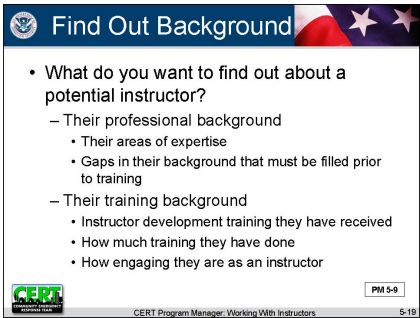
INSTRUCTOR GUIDANCE	CONTENT
 <p>Recommendation</p> <ul style="list-style-type: none">• At least two instructors jointly conduct each session<ul style="list-style-type: none">– One should be Subject Matter Expert who knows detailed content of session– One should be instructor with full knowledge of CERT model and entire course being taught <p>Display Slide 5-16</p> <p>PM, P. 5-7</p>	<ul style="list-style-type: none">▪ Nurses<ul style="list-style-type: none">• For <i>CERT Basic Training</i> Units 3 (Disaster Medical Operations-Part 1) and 4 (Disaster Medical Operations-Part 2)▪ Animal control officer or veterinarian<ul style="list-style-type: none">• Animal Response I and II▪ Amateur or professional radio operator<ul style="list-style-type: none">• CERT Emergency Communications <p>Tell participants that it is recommended that at least two instructors jointly conduct each session:</p> <ul style="list-style-type: none">▪ One should be a Subject Matter Expert who knows the detailed content of the session.▪ One should be an instructor with a full knowledge of the CERT model and the entire course being taught. <p>Refer participants to the <i>Factors to Consider When Recruiting Instructors</i> in the Participant Manual and on the following page in the Instructor Guide.</p> <p>Review it with participants.</p>

<p>PM, P. 5-7</p>	<p>Factors to Consider When Recruiting Instructors</p>
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Review the following lists of advantages and challenges to help you make decisions about the types of instructors to select.

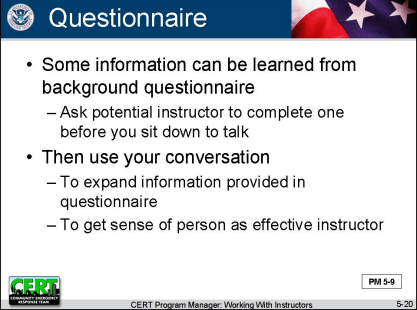
<p>Subject Matter Experts as CERT Instructors</p>	
<p>Advantages</p>	<p>Challenges</p>
<ul style="list-style-type: none"> • Often have first response experience • May have training experience • Are reliable • Have a set work schedule • Have credibility • If they are first responders, foster a relationship between the participants and the department 	<ul style="list-style-type: none"> • May be uncertain about the CERT model • May not have training experience • Cost more than CERT volunteers • May tell "war" stories • May go into too much detail for training objective
<p><i>CERT Basic Training Graduates as Instructors</i></p>	
<p>Advantages</p>	<p>Challenges</p>
<ul style="list-style-type: none"> • Are familiar with CERT operations • May have training experience • Cost less than professional responders 	<ul style="list-style-type: none"> • May not have the level of expertise that Subject Matter Experts do • May not have training experience • May cause issues with professional responders who feel that CERT graduates are taking their jobs • May not have experience to answer "what if" questions • Must fit CERT around work responsibilities

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="188 361 269 436" data-label="Image"> </div> <div data-bbox="188 512 604 825" data-label="Image"> </div> <p data-bbox="185 840 461 877">Display Slide 5-17</p> <p data-bbox="185 1438 604 1581">There are several additional sections in the Draft Program Plan where they may want to add ideas about:</p> <ul data-bbox="185 1600 532 1791" style="list-style-type: none"> ▪ Orienting instructors ▪ Tracking instructors ▪ Managing instructors ▪ Retaining instructors 	<p data-bbox="630 357 1442 428">Do experienced Program Managers have anything to add about instructor recruitment?</p> <p data-bbox="630 514 1422 585">Exercise: Draft Program Plan: Identify Recruitment Options</p> <p data-bbox="630 602 1419 709">Purpose: This exercise allows Program Managers to identify avenues they would like to pursue for instructor recruitment.</p> <p data-bbox="630 909 1383 980">Instructions: Follow the steps below to conduct the exercise.</p> <ol data-bbox="630 999 1430 1159" style="list-style-type: none"> 1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. 2. Ask participants to complete the first table of the fifth section, <i>Working with Instructors</i>, individually. <p data-bbox="630 1245 1433 1352">Debrief: Remind participants to always be alert for new possibilities for recruitment and to add them to the Draft Program Plan.</p> <p data-bbox="630 1438 1412 1545">Tell participants that, as they go through the rest of the module, they should record their ideas for working with instructors in the Draft Program Plan.</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="188 352 605 667">  <p>#2 Orient Instructors</p> <ul style="list-style-type: none"> • Even if instructor is experienced, Program Manager will want to meet with him or her <ul style="list-style-type: none"> – To learn about instructor – To orient instructor to CERT <p><small>CERT Program Manager: Working With Instructors 5-18</small></p> </div> <p>Display Slide 5-18</p> <div data-bbox="188 835 605 1150">  <p>Find Out Background</p> <ul style="list-style-type: none"> • What do you want to find out about a potential instructor? <ul style="list-style-type: none"> – Their professional background <ul style="list-style-type: none"> • Their areas of expertise • Gaps in their background that must be filled prior to training – Their training background <ul style="list-style-type: none"> • Instructor development training they have received • How much training they have done • How engaging they are as an instructor <p><small>CERT Program Manager: Working With Instructors 5-19</small></p> </div> <p>Display Slide 5-19</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>#2 Orient Instructors</p> <p>Explain that you are now going to discuss the second activity that Program Managers need to do with potential instructors. This activity is orientation.</p> <p>Say that, even if the instructor selected is experienced, the Program Manager will want to meet with him or her. There are two reasons for the meeting:</p> <ul style="list-style-type: none"> ▪ To learn about the instructor ▪ To orient the instructor to CERT <p>What You Want to Learn</p> <p>Ask participants:</p> <p>What do you want to find out about a potential instructor?</p> <p>Summarize the discussion by listing the things a CERT Program Manager needs to find out about a potential instructor:</p> <ul style="list-style-type: none"> ▪ Their professional background <ul style="list-style-type: none"> • What their areas of expertise are • Gaps in their background that must be filled prior to training ▪ Their training background <ul style="list-style-type: none"> • What instructor development training they have received • How much training they have done • How engaging they are as an instructor (ask for a sampling of evaluations)

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Questionnaire</p> <ul style="list-style-type: none">• Some information can be learned from background questionnaire<ul style="list-style-type: none">– Ask potential instructor to complete one before you sit down to talk• Then use your conversation<ul style="list-style-type: none">– To expand information provided in questionnaire– To get sense of person as effective instructor <p><small>CERT Program Manager: Working With Instructors 5-20</small></p> <p>Display Slide 5-20</p> <p>PM, P. 5-10 and 5-11</p>	<p>Say that some of this can be learned by asking the potential instructor to complete a background questionnaire before you sit down to talk. Then you can use your conversation to expand the information provided and to get a sense of this person as an effective instructor.</p> <p>Refer participants to the <i>Sample Instructor Background Questionnaire</i> in the Participant Manual and on the following pages in the Instructor Guide.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

PM, P. 5-10 and 5-11	Sample Instructor Background Questionnaire
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Name:	
Address:	Work Phone:
	Home Phone:
	Mobile Phone:
Employer:	E-mail Address:
Place a check mark next to all areas in which you have experience:	
<input type="checkbox"/> CERT Program	<input type="checkbox"/> Incident Command System (ICS) operations
<input type="checkbox"/> Fire safety and fire suppression	<input type="checkbox"/> Disaster psychology
<input type="checkbox"/> Hazardous materials safety	<input type="checkbox"/> Exercise controller
<input type="checkbox"/> Emergency medical triage and treatment	<input type="checkbox"/> Other:
<input type="checkbox"/> Search and rescue techniques and markings	
Describe your instructor development training:	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

List your past training presentation experience:

Place a check mark next to all areas for which you wish to be considered:

Lead Instructor for (name of course) _____

Co-Instructor for: (these are all sessions in *CERT Basic Training*)

- Disaster Preparedness
- Fire Safety
- Emergency Medical Operations
- Light Search and Rescue
- CERT Operations
- Disaster Psychology
- CERT and Terrorism
- Exercise Safety Officer

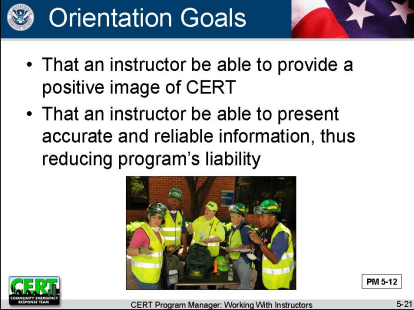

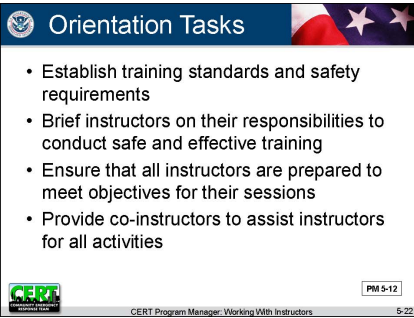

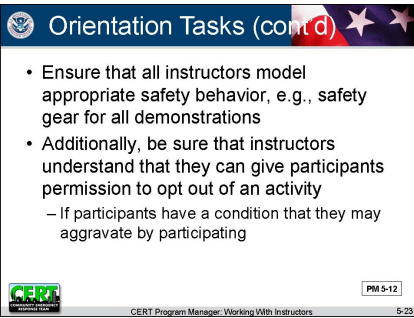

Co-Instructor for (name of course) _____

Your Signature:

Date:

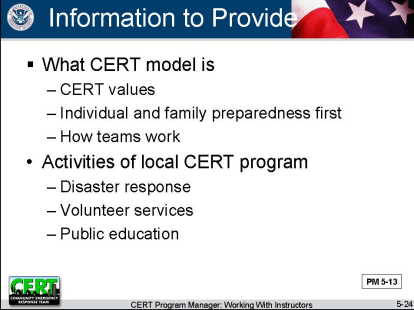
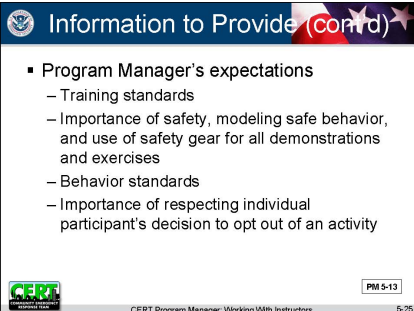
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Orientation Goals</p> <ul style="list-style-type: none">• That an instructor be able to provide a positive image of CERT• That an instructor be able to present accurate and reliable information, thus reducing program's liability  <p>CERT Program Manager: Working With Instructors 5-21</p>	<h3>What Orientation You Want to Provide</h3> <p>Remind the group that instructors are the program's representatives to the participants. The way that CERT participants react to and judge the instructors directly impacts how participants feel about your CERT program. So one concern of Program Managers is that an instructor must provide a positive image of CERT.</p> <p>Say that another concern of Program Managers is that an instructor presents accurate and reliable information, thus reducing a program's liability.</p>
 <p>Orientation Tasks</p> <ul style="list-style-type: none">• Establish training standards and safety requirements• Brief instructors on their responsibilities to conduct safe and effective training• Ensure that all instructors are prepared to meet objectives for their sessions• Provide co-instructors to assist instructors for all activities  <p>CERT Program Manager: Working With Instructors 5-22</p>	<p>Provide the six steps that Program Managers can take to ensure that instructors are an asset to the program and that they present reliable information:</p> <ul style="list-style-type: none">▪ Establish training standards and safety requirements for the training.▪ Brief all instructors on their responsibilities to conduct safe and effective training.▪ Ensure that all instructors are prepared to meet the objectives for their sessions.▪ Provide co-instructors to assist the instructors for all activities.
 <p>Orientation Tasks (cont'd)</p> <ul style="list-style-type: none">• Ensure that all instructors model appropriate safety behavior, e.g., safety gear for all demonstrations• Additionally, be sure that instructors understand that they can give participants permission to opt out of an activity<ul style="list-style-type: none">– If participants have a condition that they may aggravate by participating  <p>CERT Program Manager: Working With Instructors 5-23</p>	<ul style="list-style-type: none">▪ Ensure that all instructors model appropriate safety behavior, e.g., safety gear for all demonstrations.▪ Additionally, be sure that instructors understand that they can give participants permission to opt out of an activity if they have a condition that they may aggravate by participating.

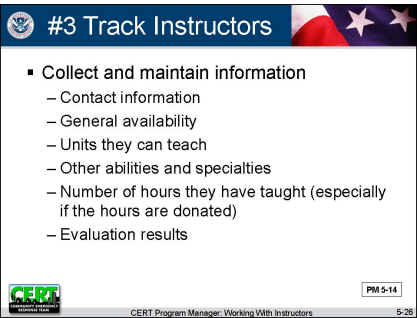
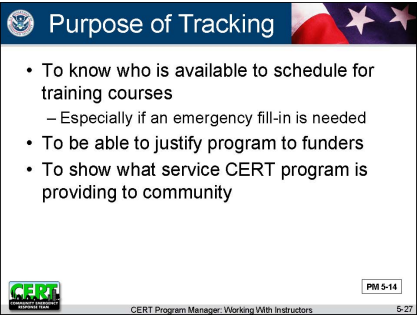
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Information to Provide</p> <ul style="list-style-type: none">▪ What CERT model is<ul style="list-style-type: none">– CERT values– Individual and family preparedness first– How teams work• Activities of local CERT program<ul style="list-style-type: none">– Disaster response– Volunteer services– Public education <p>CERT Program Manager: Working With Instructors PM 5-13 5-24</p> <p>Display Slide 5-24</p>  <p>Information to Provide (cont'd)</p> <ul style="list-style-type: none">▪ Program Manager's expectations<ul style="list-style-type: none">– Training standards– Importance of safety, modeling safe behavior, and use of safety gear for all demonstrations and exercises– Behavior standards– Importance of respecting individual participant's decision to opt out of an activity <p>CERT Program Manager: Working With Instructors PM 5-13 5-25</p> <p>Display Slide 5-25</p>	<p>Explain that this process starts at the orientation when the Program Manager provides the following information:</p> <ul style="list-style-type: none">▪ What the CERT model is<ul style="list-style-type: none">• CERT values• Individual and family preparedness first• How teams work (organization, local activation protocol, team communication method)• The standards that volunteers are held to▪ The activities of the local CERT program<ul style="list-style-type: none">• Disaster response• Volunteer services• Public education▪ The Program Manager's expectations<ul style="list-style-type: none">• Training standards, e.g., that the lesson plan will be followed• The importance of safety, modeling safe behavior, and the use of safety gear for all demonstrations and exercises• Behavior standards• The importance of respecting an individual participant's decision to opt out of an activity




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 352 605 667"><p>#3 Track Instructors</p><ul style="list-style-type: none">▪ Collect and maintain information<ul style="list-style-type: none">– Contact information– General availability– Units they can teach– Other abilities and specialties– Number of hours they have taught (especially if the hours are donated)– Evaluation results<p><small>CERT Program Manager: Working With Instructors 5-26</small></p></div> <p>Display Slide 5-26</p> <div data-bbox="191 905 605 1220"><p>Purpose of Tracking</p><ul style="list-style-type: none">• To know who is available to schedule for training courses<ul style="list-style-type: none">– Especially if an emergency fill-in is needed• To be able to justify program to funders• To show what service CERT program is providing to community<p><small>CERT Program Manager: Working With Instructors 5-27</small></p></div> <p>Display Slide 5-27</p> <p>Refer participants to the information on justifying a program in the previous unit, Working with Volunteers.</p>	<h3>#3 Track Instructors</h3> <p>Explain that tracking instructors is not much different from tracking volunteers. Program Managers must collect and maintain the following information:</p> <ul style="list-style-type: none">▪ Contact information▪ General availability▪ Units they can teach▪ Other abilities and specialties▪ Number of hours they have taught (especially if the hours are donated)▪ Evaluation results <p>Remind participants of the reasons for tracking this information:</p> <ul style="list-style-type: none">▪ Need to know who is available to schedule for training courses, especially if an emergency fill-in is needed▪ Need to be able to justify the program to funders▪ To show what service the program is providing to the community

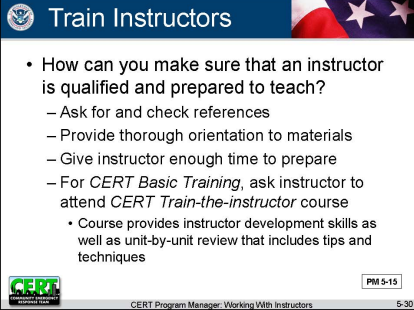
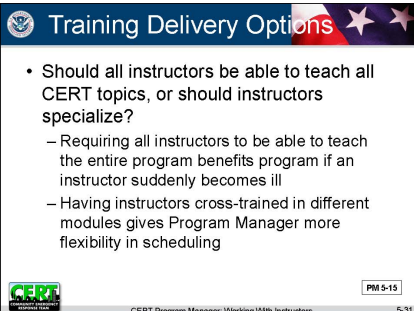
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UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 359 602 667"><ul style="list-style-type: none">• Fourth activity tasks are similar to those used with volunteers<ul style="list-style-type: none">– Train<ul style="list-style-type: none">• Make sure that they are qualified to teach– Assign<ul style="list-style-type: none">• Tell them what task is• Provide information they need to do task<p><small>CERT Program Manager: Working With Instructors 5-28</small></p></div> <p data-bbox="191 684 461 720">Display Slide 5-28</p> <div data-bbox="191 825 602 1134"><ul style="list-style-type: none">• Tasks (continued)<ul style="list-style-type: none">– Monitor<ul style="list-style-type: none">• Observe training and gather comments– Evaluate<ul style="list-style-type: none">• Provide feedback after the event; debrief with instructors<p><small>CERT Program Manager: Working With Instructors 5-29</small></p></div> <p data-bbox="191 1150 461 1186">Display Slide 5-29</p>	<h3 data-bbox="630 359 1029 401">#4 Manage Instructors</h3> <p data-bbox="630 420 1365 527">Explain that you are now going to discuss the fourth activity that Program Managers need to do with instructors. This activity is managing them.</p> <p data-bbox="630 546 1442 646">Tell participants that the management tasks for instructors are similar to those used with volunteers. The tasks are:</p> <ul data-bbox="630 667 1442 989" style="list-style-type: none">▪ Training: making sure that they are qualified to teach▪ Assigning: telling them what the task is and providing them the information they need to do the task▪ Monitoring: observing the training and gathering comments▪ Evaluating: providing feedback after the event; debriefing with instructors

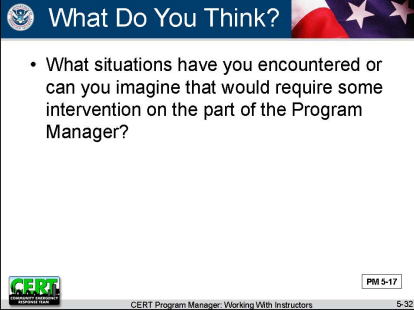
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Train Instructors</p> <ul style="list-style-type: none">• How can you make sure that an instructor is qualified and prepared to teach?<ul style="list-style-type: none">– Ask for and check references– Provide thorough orientation to materials– Give instructor enough time to prepare– For <i>CERT Basic Training</i>, ask instructor to attend <i>CERT Train-the-instructor</i> course<ul style="list-style-type: none">• Course provides instructor development skills as well as unit-by-unit review that includes tips and techniques <p>Display Slide 5-30</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>  <p>Training Delivery Options</p> <ul style="list-style-type: none">• Should all instructors be able to teach all CERT topics, or should instructors specialize?<ul style="list-style-type: none">– Requiring all instructors to be able to teach the entire program benefits program if an instructor suddenly becomes ill– Having instructors cross-trained in different modules gives Program Manager more flexibility in scheduling <p>Display Slide 5-31</p>	<h3>Training</h3> <p>Ask participants:</p> <p>How can you make sure that an instructor is qualified and prepared to teach?</p> <p>Summarize the discussion:</p> <ul style="list-style-type: none">▪ Ask for and check references.▪ Provide a thorough orientation to the materials.▪ Give the instructor enough time to prepare.▪ For <i>CERT Basic Training</i>, ask the instructor to attend the <i>CERT Train-the-Instructor</i> course. This course provides instructor development skills as well as a unit-by-unit review that includes tips and techniques. <p>Discuss how Program Managers may want to use instructors. Do they want all instructors to be able to teach all CERT topics, or do they want instructors to specialize?</p> <ul style="list-style-type: none">▪ Requiring all instructors to be able to teach the entire program will be more difficult, but it may benefit the program if an instructor suddenly becomes ill.▪ In addition, having instructors cross-trained in different modules gives a Program Manager more flexibility in scheduling.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>What Do You Think?</p> <ul style="list-style-type: none">• What situations have you encountered or can you imagine that would require some intervention on the part of the Program Manager? <p>Display Slide 5-32</p> <p>Record the responses on the easel pad. Don't discuss solutions; just record situations. See possible responses below.</p> <ul style="list-style-type: none">▪ Covers material in too much depth▪ Tells too many "war stories"▪ Skips sections of the lesson plan▪ Skips hands-on activities▪ Only lectures; no interaction with participants▪ Teaches the material wrong▪ Does not use safety equipment during demonstrations and activities	<h3>Monitoring</h3> <p>Think about the quality of training and the training skills of instructors who have worked with you.</p> <p>Ask participants:</p> <p>What situations have you encountered or can you imagine that would require some intervention on the part of the Program Manager?</p>

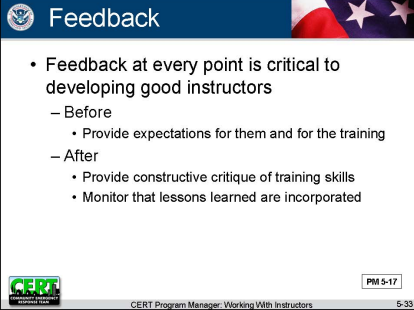

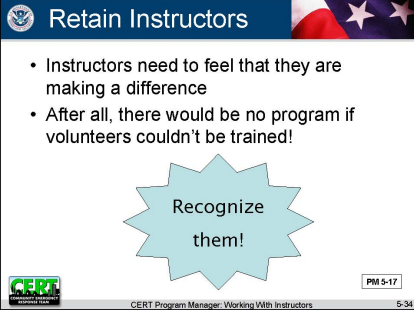
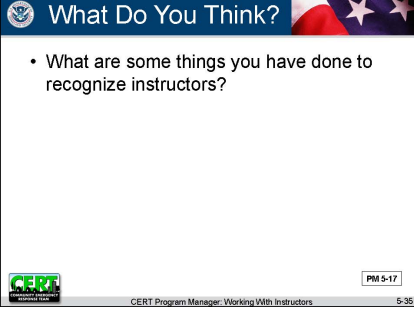
PM, P. 5-16	Working with Instructors
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Experienced CERT Program Managers have been successful in training their instructors using the steps listed below.

- **Step 1:** Provide an orientation to the CERT program and to the training.
- **Step 2:** Allow new instructors time to review the materials carefully.
- **Step 3:** If the CERT program is just starting, do a dry run of the training.
- **Step 4:** Require new instructors to observe the training before they teach their first session.
- **Step 5:** Schedule a practice session for new instructors to present the session that they will teach to the Program Manager and other instructors.
- **Step 6:** Require new instructors to co-train with an experienced instructor.
- **Step 7:** Observe the actual training session.
- **Step 8:** Schedule a meeting after the training to debrief and to identify changes to make in future sessions.
- **Step 9:** Provide corrective feedback to instructors individually.


COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

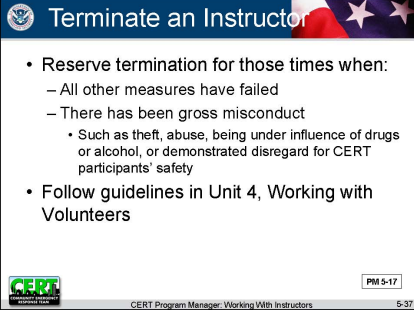

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
 <p>Feedback</p> <ul style="list-style-type: none">• Feedback at every point is critical to developing good instructors<ul style="list-style-type: none">– Before<ul style="list-style-type: none">• Provide expectations for them and for the training– After<ul style="list-style-type: none">• Provide constructive critique of training skills• Monitor that lessons learned are incorporated <p><small>CERT Program Manager: Working With Instructors 5-33</small></p> <p>Display Slide 5-33</p> 	<h3>Feedback</h3> <p>Explain that feedback at every point is critical to developing good instructors.</p> <ul style="list-style-type: none">▪ Before: Be sure that all instructors are aware of the Program Manager’s expectations for them and for the training.▪ After: Provide a constructive critique of training skills, and monitor to make sure that they incorporate the lessons learned into future classes. <p>Do experienced Program Managers have anything to add about managing instructors?</p>
 <p>Retain Instructors</p> <ul style="list-style-type: none">• Instructors need to feel that they are making a difference• After all, there would be no program if volunteers couldn’t be trained! <p>Recognize them!</p> <p><small>CERT Program Manager: Working With Instructors 5-34</small></p> <p>Display Slide 5-34</p>	<h3>#5 Retain Instructors</h3> <p>Explain that, whether they are paid or they are donating their time, instructors need to be recognized and appreciated just as volunteers do. Instructors need to feel that they are making a difference or they will go somewhere else. So keeping instructors involved is important. After all, there would be no program if the volunteers couldn’t be trained.</p>
 <p>What Do You Think?</p> <ul style="list-style-type: none">• What are some things you have done to recognize instructors? <p><small>CERT Program Manager: Working With Instructors 5-35</small></p> <p>Display Slide 5-35</p> <p>Conduct a class discussion by asking this question.</p>	<p>Ask experienced Program Managers:</p> <p>What are some things you have done to recognize instructors?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE




UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 359 605 667"><p>Recognition</p><ul style="list-style-type: none">• Does not have to be elaborate or formal<ul style="list-style-type: none">– Even simple thank you makes a big difference• Volunteer instructors who are donating their time need an extra measure of recognition<p><small>CERT Program Manager: Working With Instructors PM 5-17 5-36</small></p></div> <p data-bbox="191 684 461 720">Display Slide 5-36</p> 	<p data-bbox="634 359 1437 430">Say that recognition does not have to be elaborate or formal. Even a simple thank you makes a big difference.</p> <p data-bbox="634 447 1409 630">Tell participants that volunteer instructors who are donating their time need an extra measure of recognition. Many programs make a special point to have volunteer instructors receive an annual certificate presented by the Fire Chief or a key elected official.</p> <p data-bbox="634 751 1437 823">Do experienced Program Managers have anything to add about instructor retention?</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 359 602 667">  <p>Terminate an Instructor</p> <ul style="list-style-type: none"> • Reserve termination for those times when: <ul style="list-style-type: none"> – All other measures have failed – There has been gross misconduct <ul style="list-style-type: none"> • Such as theft, abuse, being under influence of drugs or alcohol, or demonstrated disregard for CERT participants' safety • Follow guidelines in Unit 4, Working with Volunteers <p><small>CERT Program Manager: Working With Instructors PM 5-17 5-37</small></p> </div> <p>Display Slide 5-37</p> <div data-bbox="191 1136 267 1205">  </div>	<p><i>Terminate an Instructor</i></p> <p>Say that sometimes the Program Manager may decide that an instructor needs to be terminated. As with program volunteers, termination should be reserved for those times when:</p> <ul style="list-style-type: none"> ▪ All other measures have failed. ▪ There has been gross misconduct such as theft, abuse, being under the influence of drugs or alcohol, or demonstrated disregard for CERT participants' safety. <p>Remind participants that, from the beginning, instructors should be made aware of the disciplinary policy and the possibility of termination if they do not meet the expectations and standards set by the program.</p> <p>Refer Program Managers to the guidelines in Unit 4, Working with Volunteers, should they have a situation that causes concern.</p> <p>Do experienced Program Managers have anything to add about strategies they have used when terminating an instructor?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 5: WORKING WITH INSTRUCTORS

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="240 359 675 401"> Unit Summary</p> <ul data-bbox="261 415 609 632" style="list-style-type: none">• The Program Manager and the CERT Instructor• Recruit Instructors• Orient Instructors• Track Instructors• Manage Instructors• Retain Instructors• Terminate an Instructor <p data-bbox="240 646 675 688"> CERT Program Manager: Working With Instructors PM 5-18 5-38</p> <p data-bbox="240 701 509 737">Display Slide 5-38</p> 	<p data-bbox="706 359 959 401">Unit Summary</p> <p data-bbox="706 415 1495 485">Tell participants that this unit has looked at working with instructors:</p> <ul data-bbox="706 506 1430 856" style="list-style-type: none">▪ The Program Manager and the CERT Instructor▪ Recruit Instructors▪ Orient Instructors▪ Track Instructors▪ Manage Instructors▪ Retain Instructors▪ Terminate an Instructor <p data-bbox="706 890 1487 961">Do you have any questions about anything covered in this unit?</p> <p data-bbox="706 1045 862 1081">Transition</p> <p data-bbox="706 1100 1463 1171">The next unit will discuss how to procure and manage resources for your program.</p>

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UNIT 6: PROCURING AND MANAGING RESOURCES

In this unit you will learn about:

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

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

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

SCOPE

The topics that will be discussed in this unit are:

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

**ESTIMATED
COMPLETION
TIME**

1.5 hours

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

TRAINING METHODS

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

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

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

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

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

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

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
 - *Community Emergency Response Team Program Manager Participant Manual* (for participants)
 - PowerPoint slides 6-1 to 6-34
-

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

EQUIPMENT

The following equipment is required for this unit:

- A computer with PowerPoint software
- A computer projector and screen
- Easel pad and easel or whiteboard
- Markers

NOTES

A suggested time plan for this unit is as follows:

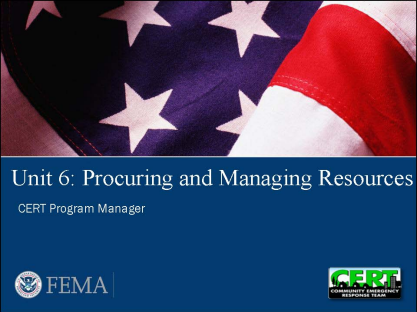
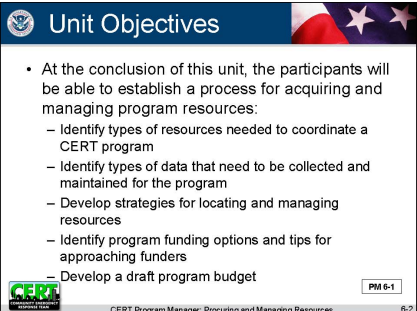
Unit Overview	1 minute
Identifying Physical Resource Needs	53 minutes
Draft Program Plan: Identify Physical Resource Procurement Factors to Consider	5 minutes
Managing Data	15 minutes
Draft Program Plan: Record Data Collection and Recordkeeping Ideas.....	5 minutes
Budgeting and Funding	10 minutes
Unit Summary.....	1 minute
Total Time: 1.5 hours	

REMARKS

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

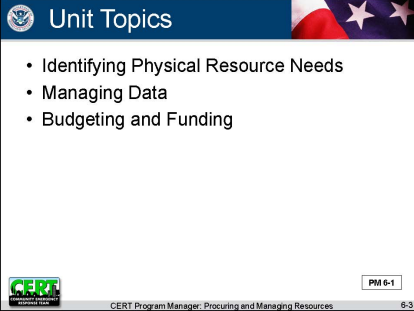
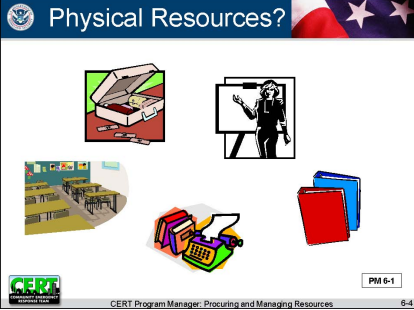
Plan to make the copies during the evening of the first day of training and return the copies on the second day. You will need to make one copy of each scenario for each participant.

Unit 6: Procuring and Managing Resources

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

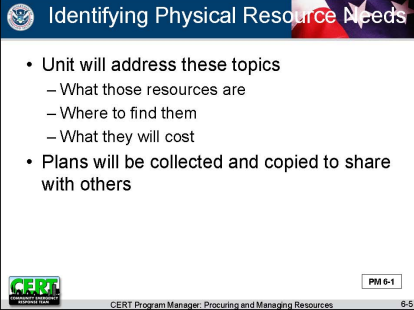
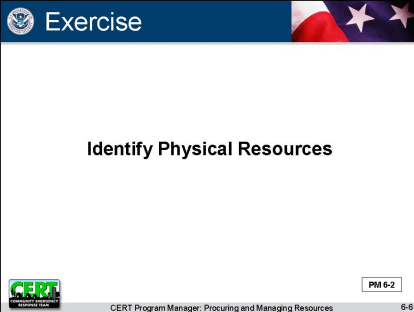
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• Identifying Physical Resource Needs• Managing Data• Budgeting and Funding <p>CERT Program Manager: Procuring and Managing Resources 6-3</p> <p>Display Slide 6-3</p>	<h3>Unit Topics</h3> <p>Say that, given the nature of the training that CERT provides and the work that CERTs do, running a CERT program is resource intensive. Therefore it is important to know what resources are needed and where to find them, what data to gather and how to track it, and how to develop a budget and get it funded.</p> <p>Say that this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ Identifying Physical Resource Needs▪ Managing Data▪ Budgeting and Funding
 <p>Physical Resources?</p> <p>CERT Program Manager: Procuring and Managing Resources 6-4</p> <p>Display Slide 6-4</p> <p>Emphasize this point.</p>	<h3>Identifying Physical Resource Needs</h3> <p>Explain that CERT programs have lots of physical resource needs. By physical resources we are talking about:</p> <ul style="list-style-type: none">▪ Training supplies▪ Instructors▪ Office equipment▪ Training facility▪ Printed materials▪ Etc. <p>Explain physical resources include everything EXCEPT data and funding.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Identifying Physical Resource Needs</p> <ul style="list-style-type: none">• Unit will address these topics<ul style="list-style-type: none">– What those resources are– Where to find them– What they will cost• Plans will be collected and copied to share with others <p>CERT CERT Program Manager: Procuring and Managing Resources PM 6-1 6-5</p> <p>Display Slide 6-5</p>  <p>Exercise</p> <p>Identify Physical Resources</p> <p>CERT CERT Program Manager: Procuring and Managing Resources PM 6-2 6-6</p> <p>Display Slide 6-6</p> <p>PM, P. 6-3 to 6-6</p>	<p>Explain that, during the first hour of training participants are going to work in small groups to figure out just what those resources are, where to find them, and their per-unit cost.</p> <p>Tell participants that at the end of the unit the plans will be collected and copied so everyone has the benefit of each other's work.</p> <p>Exercise: Identify Physical Resources</p> <p>Purpose: This exercise allows participants to identify what resources they would need for a particular scenario.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Divide the class into four small groups. Include at least one experienced Program Manager in each group.2. Refer participants to <i>Procuring and Managing Program Resources</i> in the Participant Manual and on the following pages in the Instructor Guide.3. Assign a different scenario to each small group.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
<p>This is a progressive exercise. Emphasize that participants should only complete the assigned parts of the worksheet.</p>	<p>4. Review the instructions:</p> <ul style="list-style-type: none">a. For Our assignment, fill in the underlined text of the scenario assigned to you.b. For We made these assumptions: As you complete the full exercise, you may find that there are assumptions you are making about how you would implement the scenario. Those assumptions should be entered in this area.<ul style="list-style-type: none">i. Example for Scenario #2: “We assume that the course will last 21 hours.”ii. One assumption has been entered: That you will have adequate funding to complete the task.c. Complete the first column ONLY of the table on the second page, What Resources Do We Need? Think about the scenario and ask what resources are needed to complete the activity. Be sure to be very thorough in identifying your resources. Use extra pages if needed.d. NOTE: DO NOT fill out the second or third columns in the table on resources at this time.e. You have 10 minutes.f. You will report your list to the whole group. <p>Debrief:</p> <ul style="list-style-type: none">1. Ask each group to state its scenario and then to list the resources the group identified that they would need.2. Ask other groups to add anything that was missed.3. If funding is raised as a concern, acknowledge that no plan is ever developed without budget concerns being one of the factors. However, for this exercise try to set aside funding questions.4. Ask if any groups made assumptions. If so, ask for some examples.

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

Scenarios

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

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

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

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

2. _____

3. _____

4. _____

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

5.

6.

7.

8.

9.

10.

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

We need to collect and track this information:

1.

2.

3.

4.

5.

6.

7.

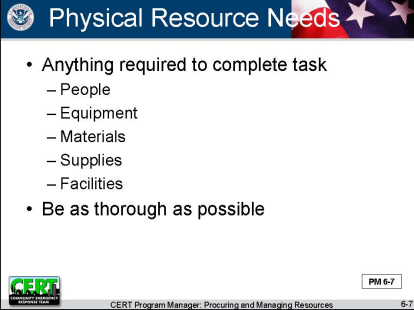
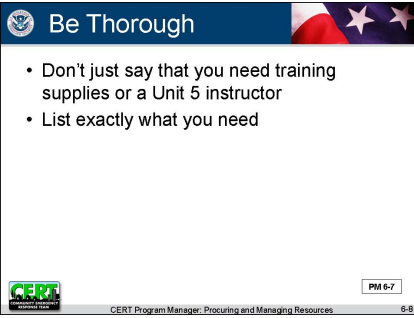
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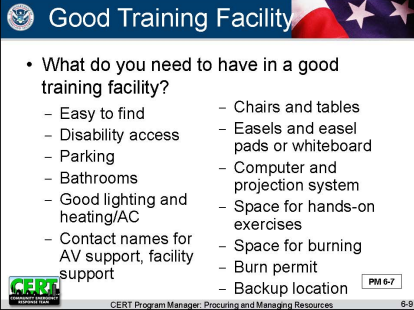
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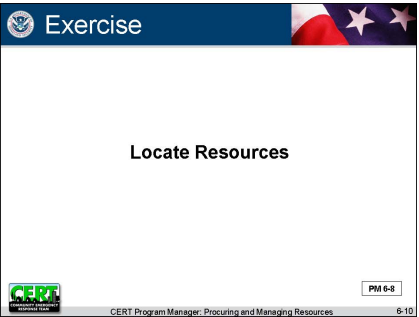
UNIT 6: PROCURING AND MANAGING RESOURCES

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE


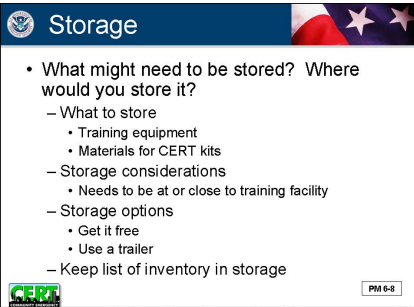
UNIT 6: PROCURING AND MANAGING RESOURCES

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

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 6-10</p>	<p>Exercise: Locate Resources</p> <p>Purpose: This exercise allows participants to identify where or how they would get the resources they need for their scenario.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Review the instructions: <ol style="list-style-type: none"> a. In the same small groups, add resources to their lists if the previous discussion stimulated ideas. b. Complete the second column ONLY of the table on the second page, Where/How Will We Get Them? Be creative in thinking about your options. c. You have 10 minutes. <p>Debrief:</p> <ol style="list-style-type: none"> 1. Ask each group what decision they made about finding resources. <ol style="list-style-type: none"> a. Did they have to pay for it? b. Could they borrow or share it? c. Could they scavenge it? d. Could they swap it for something else? 2. Ask other groups to add further ideas. For example: get an administrative assistant from Senior Corps or AmeriCorps. 3. Remember that most CERT programs are not started in complete isolation. Your affiliation with your sponsor will undoubtedly give you access to some resources.

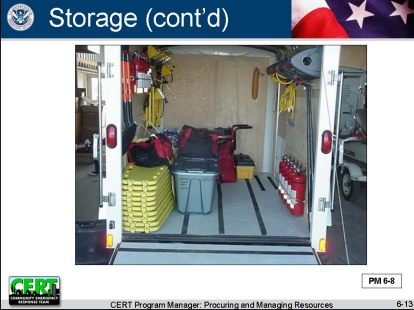
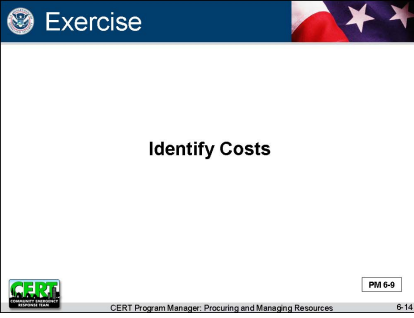
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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

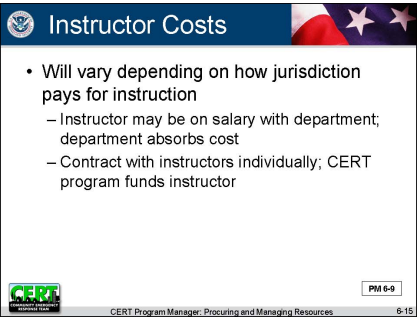
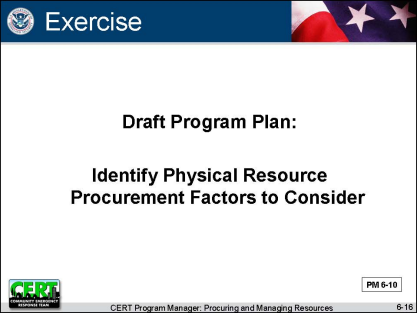

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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





COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 352 605 667"><p>Instructor Costs</p><ul style="list-style-type: none">• Will vary depending on how jurisdiction pays for instruction<ul style="list-style-type: none">– Instructor may be on salary with department; department absorbs cost– Contract with instructors individually; CERT program funds instructor<p><small>CERT Program Manager: Procuring and Managing Resources 6-15</small></p></div> <p data-bbox="191 682 462 718">Display Slide 6-15</p> <div data-bbox="191 892 605 1207"><p>Exercise</p><p>Draft Program Plan:</p><p>Identify Physical Resource Procurement Factors to Consider</p><p><small>CERT Program Manager: Procuring and Managing Resources 6-16</small></p></div> <p data-bbox="191 1222 462 1257">Display Slide 6-16</p> <p data-bbox="191 1272 605 1417">If you are short on time, point out this section and ask participants to complete it on their own.</p> 	<p data-bbox="630 359 1442 464">Discuss instructor costs. Depending on how the jurisdiction pays for instruction, the costs for holding the <i>CERT Basic Training</i> course and other training may vary.</p> <ul data-bbox="630 485 1442 674" style="list-style-type: none">▪ Some departments have instructors on salary and will absorb the cost into their annual budget.▪ Others have to contract with instructors individually and the CERT program will have to fund the instructor. <p data-bbox="630 751 1393 856">Explain that this section has addressed procuring and managing resources. You probably have some ideas that you want to remember.</p> <p data-bbox="630 892 1360 961">Exercise: Draft Program Plan: Identify Physical Resource Procurement Factors to Consider</p> <p data-bbox="630 982 1393 1087">Purpose: This exercise allows Program Managers to record factors they might need to consider when procuring resources.</p> <p data-bbox="630 1108 1393 1171">Instructions: Follow the steps below to conduct the exercise.</p> <ol data-bbox="630 1199 1442 1465" style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to complete the first table of the sixth section, <i>Procuring and Managing Resources</i>, individually. The table title is “When procuring program resources, I need to think about these management issues.” <p data-bbox="630 1501 1414 1606">Before moving on to talk about managing data, are there any questions about what resources are needed, where to find them, and how to cost them?</p>

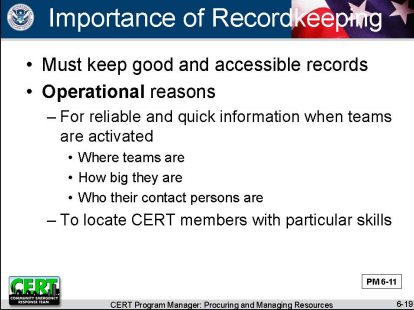
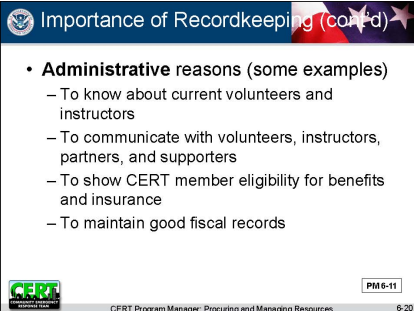
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="191 359 602 667"><p>• Must keep good and accessible records</p><p>• Operational reasons</p><ul style="list-style-type: none">– For reliable and quick information when teams are activated<ul style="list-style-type: none">• Where teams are• How big they are• Who their contact persons are– To locate CERT members with particular skills<p><small>CERT Program Manager: Procuring and Managing Resources 6-19</small></p></div> <p data-bbox="191 684 461 716">Display Slide 6-19</p> <div data-bbox="191 1052 602 1360"><p>• Administrative reasons (some examples)</p><ul style="list-style-type: none">– To know about current volunteers and instructors– To communicate with volunteers, instructors, partners, and supporters– To show CERT member eligibility for benefits and insurance– To maintain good fiscal records<p><small>CERT Program Manager: Procuring and Managing Resources 6-20</small></p></div> <p data-bbox="191 1377 461 1409">Display Slide 6-20</p>	<h3 data-bbox="634 359 1084 390">Importance of Recordkeeping</h3> <p data-bbox="634 411 1430 548">Explain that maintaining records is an important part of a CERT program. There are operational, administrative, and political reasons to keep good and accessible records.</p> <ul data-bbox="634 573 1430 1703" style="list-style-type: none">▪ Operational<ul style="list-style-type: none">• During emergency operations, the teams may self-activate.• However, if the sponsoring agency needs to activate the teams, the CERT program will need reliable and quick information – where the teams are, how big they are, who their contact persons are.• If particular skills are needed, the Program Manager needs to be able to locate people with those skills.▪ Administrative<ul style="list-style-type: none">• The CERT program needs to keep track of volunteers and instructors, e.g., how many people have completed the <i>CERT Basic Training</i>, up-to-date contact info, which instructors can teach which units, and advanced training CERT members may have taken. (See Units 4 and 5)• The CERT program needs to stay in touch with current and former volunteers and instructors, as well as with program partners and supporters.• Keeping records allows CERT members to be eligible for benefits and insurance if these are available to the State’s volunteer emergency workers.• The CERT program needs to maintain good fiscal records for legal and budgetary reasons.

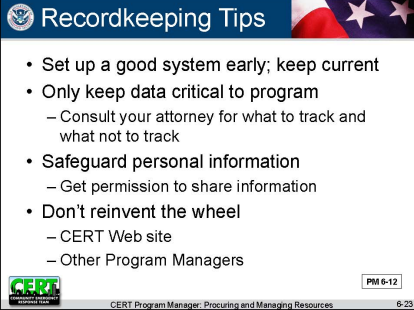
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 390">Importance of Recordkeeping (cont'd)</p> <ul data-bbox="212 411 581 485" style="list-style-type: none">• Political reasons (some examples)<ul data-bbox="233 436 440 485" style="list-style-type: none">– To generate statistics– To prove value of program  <p data-bbox="196 632 602 667"> CERT Program Manager: Procuring and Managing Resources PM 6-11 6-21</p>	<ul data-bbox="634 359 1442 590" style="list-style-type: none">▪ Political<ul data-bbox="683 411 1442 590" style="list-style-type: none">• Recordkeeping is necessary to generate statistical information for interested parties, such as elected officials, about the number of participants in different parts of the city and the growth of the program.
<p data-bbox="191 684 456 716">Display Slide 6-21</p> <p data-bbox="191 751 602 783">Reduce Liability</p> <ul data-bbox="212 804 581 940" style="list-style-type: none">• Ways to reduce liability<ul data-bbox="233 829 581 919" style="list-style-type: none">– Provide training in how to respond safely and effectively in an emergency– Maintain accurate and complete records so that you can document what you have done• Visit CERT Web site to learn more <p data-bbox="196 1024 602 1062"> CERT Program Manager: Procuring and Managing Resources PM 6-12 6-22</p>	<p data-bbox="634 751 911 783">Reducing Liability</p> <p data-bbox="634 804 1393 909">Say that some of the most frequently asked questions about CERT programs concern liability and how to manage the liability for the CERT program.</p> <ul data-bbox="634 930 1425 1234" style="list-style-type: none">▪ Providing training in how to respond safely and effectively in an emergency is one way that a CERT program addresses liability and prepares CERT members.▪ Another way is to maintain accurate and complete records so that the Program Manager can document what the program has done. Good recordkeeping is an important part of risk management.
<p data-bbox="191 1079 456 1110">Display Slide 6-22</p>	<p data-bbox="634 1266 1393 1371">Tell participants that there is information on the CERT Web site about reducing liability. Be sure to read it. www.citizencorps.gov/cert/start-3-1d.shtm</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 667">The slide thumbnail shows the title 'Recordkeeping Tips' with a small American flag graphic. Below the title is a bulleted list of tips: 'Set up a good system early; keep current', 'Only keep data critical to program' (with a sub-bullet 'Consult your attorney for what to track and what not to track'), 'Safeguard personal information' (with a sub-bullet 'Get permission to share information'), and 'Don't reinvent the wheel' (with sub-bullets 'CERT Web site' and 'Other Program Managers'). At the bottom left is the CERT logo, and at the bottom right is a box labeled 'PM 6-12'.</p> <p data-bbox="191 684 461 716">Display Slide 6-23</p> <p data-bbox="191 1104 358 1136">PM, P. 6-13</p>	<p data-bbox="634 359 938 390">Recordkeeping Tips</p> <p data-bbox="634 411 1101 443">Provide these tips to participants:</p> <ul data-bbox="634 464 1442 1062" style="list-style-type: none">▪ Set up a good recordkeeping system as soon as possible. Keep it current. It will make the job easier.▪ Only keep data critical to the program. Consult the sponsoring agency's legal counsel (e.g., city attorney) to see for what to track and what not to track.▪ Safeguard personal information. Get permission from each volunteer before sharing information with anyone, even other volunteers.▪ Don't reinvent the wheel. There are many sample forms to use as a starting point.<ul data-bbox="683 915 1382 1062" style="list-style-type: none">• Check out the CERT Web site. www.citizencorps.gov/cert/start-2-4.shtm• Ask other Program Managers for copies of the forms they use. <p data-bbox="634 1104 1398 1209">Refer participants to <i>Maintaining CERT Records</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p data-bbox="634 1230 1406 1293">Review it with participants. It provides some additional information and tips on maintaining records.</p>

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

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

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

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


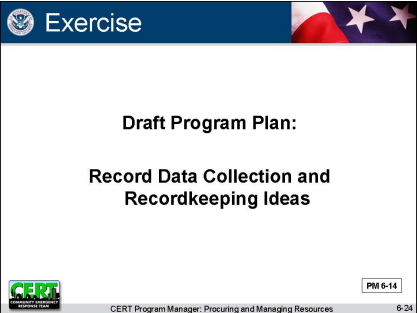
Don't bury yourself in records. Don't maintain data you won't need or won't use. Think carefully about what you really want to record before developing your forms.

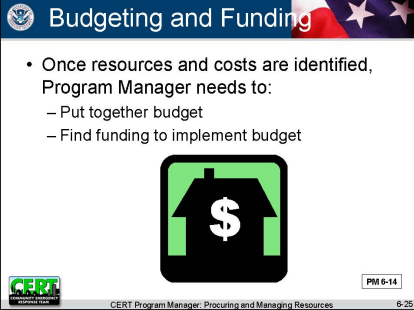
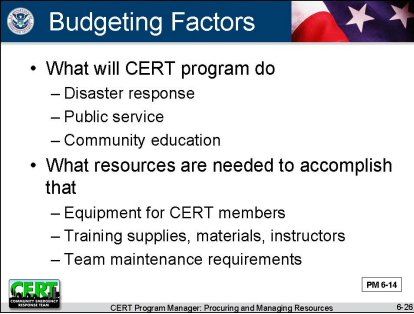
Test the forms with your first class. Provide the forms to your first class to ensure that they record the information you need and the forms work the way you want them to work.

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

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

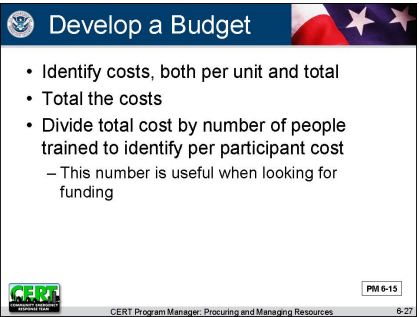
Enlist some help. If you don't have an administrative assistant assigned to the program, try to enlist one of the CERT graduates to help you. CERT graduates are doing much more than response. In many communities, graduates are coordinating newsletter development, coordinating Web sites, maintaining equipment,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

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

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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

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

Sample Costs Per Student


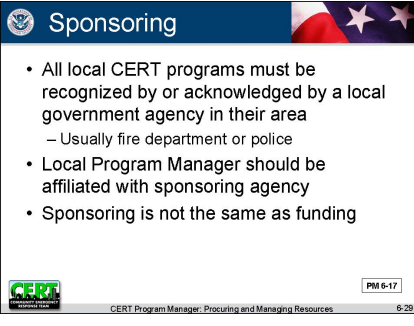
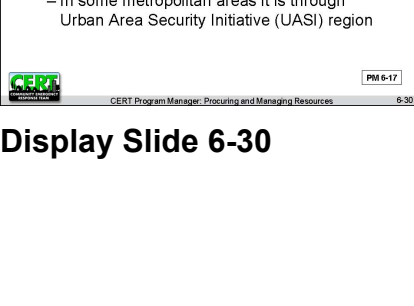
Helmet, vest & badge	16	
Training manual	12	<u> </u>
100 graduates @ \$28 ea.		\$ 2,800

Total Sample Program Costs \$35,550

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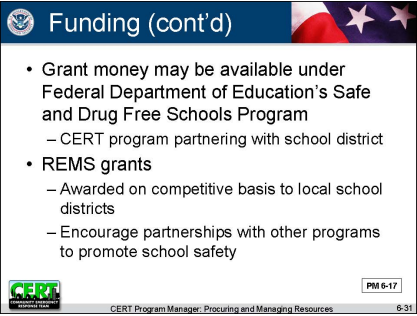
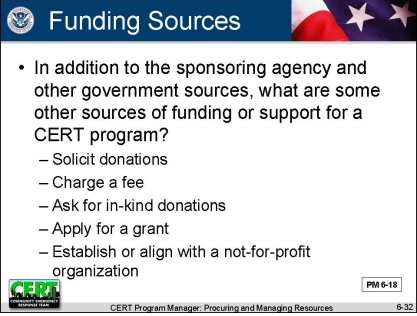
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>CERT Web Site Resources</p> <ul style="list-style-type: none">• Two companion documents<ul style="list-style-type: none">– CERT Resource Requirements Worksheet– CERT Program Costs Worksheet• Documents are primarily for putting on <i>CERT Basic Training</i> course and not for a broader program• Can be expanded for any CERT program configuration• Also link to access Excel Spreadsheet version of CERT Program Costs Worksheet tool <p><small>CERT Program Manager: Procuring and Managing Resources 6-28</small></p>	<p>Tell participants that on the CERT Web site participants can find two companion documents:</p> <ul style="list-style-type: none">▪ CERT Resource Requirements Worksheet www.citizencorps.gov/cert/start-1-2e.shtm▪ CERT Program Costs Worksheet www.citizencorps.gov/cert/start-1-2g.shtm
<p>Display Slide 6-28</p>	<p>Say that these two documents are primarily for putting on a <i>CERT Basic Training</i> course and not for a broader program. However, they can be expanded for any CERT program configuration. There is also a link to access an Excel Spreadsheet version of the CERT Program Costs Worksheet tool.</p>
 <p>Sponsoring</p> <ul style="list-style-type: none">• All local CERT programs must be recognized by or acknowledged by a local government agency in their area<ul style="list-style-type: none">– Usually fire department or police• Local Program Manager should be affiliated with sponsoring agency• Sponsoring is not the same as funding <p><small>CERT Program Manager: Procuring and Managing Resources 6-29</small></p>	<p>Funding</p> <p>Say that all local CERT programs must be recognized by or acknowledged by a local government agency in their area. That agency is usually a fire department or police department.</p> <p>The local Program Manager should be affiliated with the sponsoring agency.</p>
<p>Display Slide 6-29</p>	
 <p>Funding</p> <ul style="list-style-type: none">• Many local governments use Federal grant funding to support local CERT program, in addition to local funding<ul style="list-style-type: none">– Only governmental agencies may receive Federal funding that supports CERT• Most funding comes through States<ul style="list-style-type: none">– In some metropolitan areas it is through Urban Area Security Initiative (UASI) region <p><small>CERT Program Manager: Procuring and Managing Resources 6-30</small></p>	<p>Explain that just because a government agency sponsors the CERT program does not mean that the agency will provide all the funding for the CERT program. In fact, it probably will not.</p> <ul style="list-style-type: none">▪ Many local governments that sponsor or operate a CERT program provide some local funding but most also use some Federal grant funding to support it. <p>(continued)</p>
<p>Display Slide 6-30</p>	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 6-31</p>  <p>Display Slide 6-32</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses. Before moving on, ask the participants if they have any questions.</p>	<ul style="list-style-type: none">Only governmental agencies may receive the Department of Homeland Security funding that supports CERT. Most of this funding comes through the States or, in some metropolitan areas, through the Urban Area Security Initiative (UASI) region. For more information, contact your State Office of Emergency Management/Homeland Security, or visit www.fema.gov/government/grant/index.shtmIf you are starting a CERT program in partnership with a school district, grant money may be available under the Federal Department of Education's Safe and Drug Free Schools Program. "Readiness and Emergency Management for Schools" (REMS) grants are awarded on a competitive basis to local school districts and encourage partnerships with other programs to promote school safety. For more information, visit http://www2.ed.gov/programs/dvpemergencyresponse/index.html <p>Ask participants:</p> <p>In addition to the sponsoring agency and other government sources, what are some other sources of funding or support for a CERT program?</p> <p>Summarize the discussion by listing other sources of support and funding:</p> <ul style="list-style-type: none">Solicit donationsCharge a feeAsk for in-kind donationsApply for a grantEstablish or align with a not-for-profit organization

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

INSTRUCTOR GUIDANCE	CONTENT
PM, P. 6-19 to 6-20	<p>Note that there are alternatives to establishing a not-for-profit organization that may provide the same benefits. These are included in the <i>Sources of Program Support</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Examine each of these options in more detail.</p>

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

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

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

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

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

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

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

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

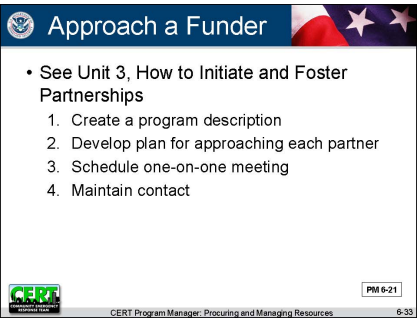
Establish a not-for-profit organization. Some CERT programs have established themselves as not-for-profit organizations, which are also called 501(c)(3) organizations. Organizations need to complete and submit an application for 501(c)(3) status and, typically, CERT programs that have done so are well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

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

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

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES


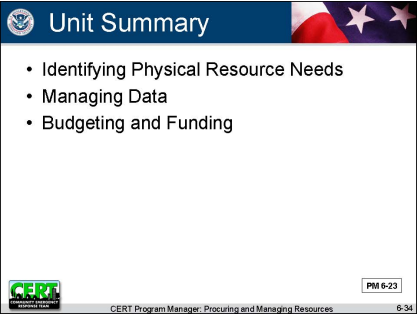

INSTRUCTOR GUIDANCE	CONTENT
 <p>• See Unit 3, How to Initiate and Foster Partnerships</p> <ol style="list-style-type: none">1. Create a program description2. Develop plan for approaching each partner3. Schedule one-on-one meeting4. Maintain contact <p>Display Slide 6-33</p> <p>PM, P. 6-22</p>	<h3>How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

PM, P. 6-22	Approach a Funder Checklist
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1. Present the program description along with financial information.
 - a. Project the income and expenses for 1-5 years.
 - b. Remember that funders want to know about tangible results, e.g., what will be done, how many people will be trained.
 - c. Businesses of any size that might contribute to the local CERT program will also want to know how they will benefit, e.g., community relations.
2. Develop a plan for approaching each partner.
 - a. In addition to the items in Unit 3, identify other people and organizations that can provide recommendations for you.
3. Schedule a one-on-one meeting.
 - a. Practice your presentation several times before the meeting.
4. Maintain contact after the meeting.
 - a. Keep yourself visible without being overbearing.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 6: PROCURING AND MANAGING RESOURCES

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

UNIT 7: TRAINING AND EXERCISES

In this unit you will learn about:

- **CERT Training and Exercises.** The types of training and exercises offered by a CERT program.
- **Tailoring *CERT Basic Training*.** How to tailor *CERT Basic Training* to the local area.
- **Managing Training and Exercises.** The tasks and schedule needed to put on a CERT training or exercise.
- **The CERT Training and Exercise Plan.** How to develop training and exercise (T&E) plan and assure that it is part of the jurisdiction's T&E plan.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

LEARNING OBJECTIVES/ PERFORMANCE OUTCOMES	<p>At the conclusion of this unit, the participants will be able to:</p> <ul style="list-style-type: none">▪ Build a plan for delivering and managing safe training and exercises.<ul style="list-style-type: none">• Identify training and exercises that are required or available for CERT volunteers.• Explain how to tailor content from <i>CERT Basic Training</i>.• Identify tasks required for managing CERT trainings.• Describe the elements of a CERT Training and Exercise (T&E) Plan.• Explain how to ensure safety during training and exercises.
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SCOPE	<p>The topics that will be discussed in this unit are:</p> <ul style="list-style-type: none">▪ Unit Overview▪ CERT Training and Exercises▪ Tailoring <i>CERT Basic Training</i>▪ Managing Training and Exercises▪ The CERT Training and Exercise (T&E) Plan▪ Unit Summary
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ESTIMATED COMPLETION TIME	2 hours
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TRAINING METHODS	<p>The instructor begins by using a guided discussion to review CERT training: what is required, what is recommended, CERT supplemental training modules, other CERT training, and training that may be arranged by the local program. Then the instructor discusses how to develop a training and exercise (T&E) plan and assure that it is part of the jurisdiction's T&E plan.</p> <p>Next the instructor presents the ways that <i>CERT Basic Training</i> should be tailored to the local community. Each participant develops a local scenario that would work for a sizeup exercise in Unit 5, Light Search and Rescue Operations. Participants add tailoring ideas to their Draft Program Plan.</p>
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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

TRAINING METHODS (CONTINUED)

Then the instructor and class work together on how to manage training and exercises. They develop a list of tasks they would need to accomplish to put on a *CERT Basic Training* course. Then they put each task on the appropriate place of an 8-week schedule, e.g., what things on this list need to happen 8 weeks before class, what things on this list need to happen 7 weeks before class, etc. Participants enter this information in their Draft Program Plan. Participants are referred to resources on the CERT Web site.

Finally the instructor discusses the benefits of the CERT Training and Exercise (T&E) Plan and how to follow the general concepts of Homeland Security Exercise and Evaluation Program (HSEEP). The instructor introduces a sample training and development plan and walks participants through each of the five elements: objective, plan for meeting objective, logistical needs to meet objective, risk to members, and evaluation of objective. The instructor focuses in particular on how to reduce liability during training and exercises. Participants add ideas for objectives to their Draft Program Plan.

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
- *Community Emergency Response Team Program Manager Participant Manual* (for participants)
- PowerPoint slides 7-1 to 7-35

EQUIPMENT

The following equipment is required for this unit:

- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers
-

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

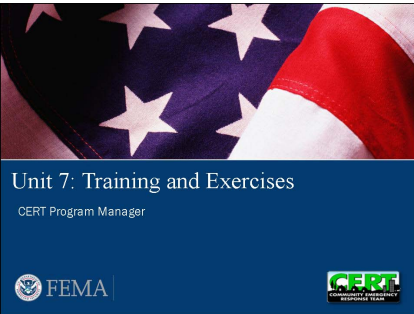
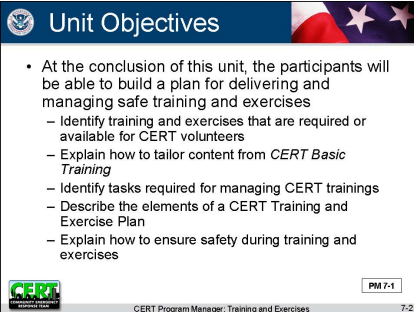
UNIT 7: TRAINING AND EXERCISES

NOTES

A suggested time plan for this unit is as follows:

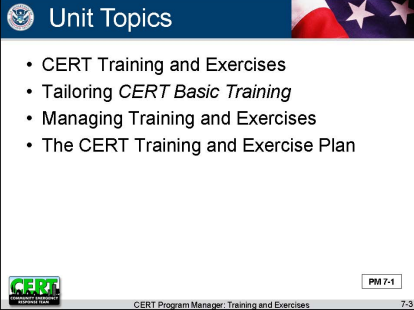
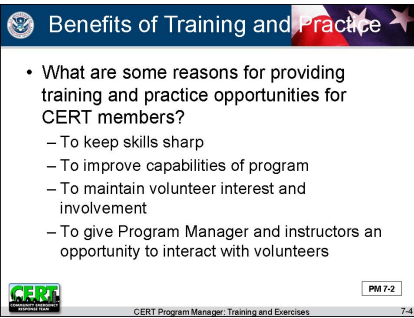
Unit Overview	1 minutes
CERT Training and Exercises	20 minutes
Tailoring CERT Basic Training	25 minutes
Draft Program Plan: Identify Ideas for Tailoring Training and Exercises	5 minutes
Managing Training and Exercises	20 minutes
The CERT Training and Exercise Plan	43 minutes
Draft Program Plan: Identify Possible Objectives for Training and Exercises	5 minutes
Unit Summary	1 minute
Total Time:	2 hours

Unit 7: Training and Exercises

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 7-1</p>	<p>Unit Overview</p> <p>Say that delivering training and providing refresher exercises are essential to creating and maintaining a credible CERT program. This unit looks at:</p> <ul style="list-style-type: none"> ▪ The types of training and exercises a program provides ▪ How to manage and schedule training ▪ How to develop and maintain a training and exercise (T&E) plan <p>Tell participants that the unit also examines how to tailor the <i>CERT Basic Training</i> course to a local community.</p>
 <p>Display Slide 7-2</p>	<p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to build a plan for delivering and managing safe training and exercises:</p> <ul style="list-style-type: none"> ▪ Identify training and exercises that are required or available for CERT volunteers. ▪ Explain how to tailor content from <i>CERT Basic Training</i>. ▪ Identify tasks required for managing CERT trainings. ▪ Describe the elements of a CERT Training and Exercise (T&E) Plan. ▪ Explain how to ensure safety during training and exercises.

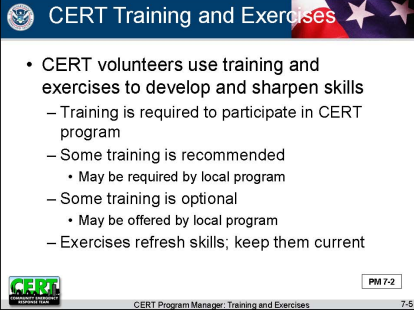
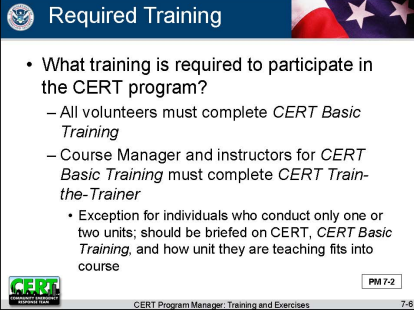
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• CERT Training and Exercises• Tailoring <i>CERT Basic Training</i>• Managing Training and Exercises• The CERT Training and Exercise Plan <p>CERT Program Manager: Training and Exercises PM 7-1 7-3</p>	<h3>Unit Topics</h3> <p>Say that, to meet the objectives, this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ CERT Training and Exercises▪ Tailoring <i>CERT Basic Training</i>▪ Managing Training and Exercises▪ The CERT Training and Exercise (T&E) Plan
<h3>Display Slide 7-3</h3>  <p>Benefits of Training and Practice</p> <ul style="list-style-type: none">• What are some reasons for providing training and practice opportunities for CERT members?<ul style="list-style-type: none">– To keep skills sharp– To improve capabilities of program– To maintain volunteer interest and involvement– To give Program Manager and instructors an opportunity to interact with volunteers <p>CERT Program Manager: Training and Exercises PM 7-2 7-4</p>	<h3><i>CERT Training and Exercises</i></h3> <p>Ask participants:</p> <h4>What are some reasons for providing training and practice opportunities for CERT members?</h4> <p>Summarize the discussion by giving the reasons for providing training and practice opportunities:</p> <ul style="list-style-type: none">▪ To keep skills sharp (“use it or lose it”)▪ To improve the capabilities of the program (to become more valuable to the community)▪ To maintain volunteer interest and involvement (see volunteer retention in Unit 4)▪ To give the Program Manager and instructors an opportunity to interact with the volunteers
<h3>Display Slide 7-4</h3> <p>This slide is animated. This first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	

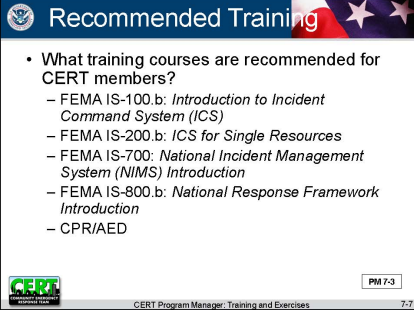
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>• CERT volunteers use training and exercises to develop and sharpen skills</p> <ul style="list-style-type: none">– Training is required to participate in CERT program<ul style="list-style-type: none">• Some training is recommended<ul style="list-style-type: none">• May be required by local program– Some training is optional<ul style="list-style-type: none">• May be offered by local program– Exercises refresh skills; keep them current <p>Display Slide 7-5</p>  <p>• What training is required to participate in the CERT program?</p> <ul style="list-style-type: none">– All volunteers must complete <i>CERT Basic Training</i>– Course Manager and instructors for <i>CERT Basic Training</i> must complete <i>CERT Train-the-Trainer</i><ul style="list-style-type: none">• Exception for individuals who conduct only one or two units; should be briefed on CERT, <i>CERT Basic Training</i>, and how unit they are teaching fits into course <p>Display Slide 7-6</p> <p>This slide is animated. This first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Tell participants that CERT volunteers use training and exercises to develop and sharpen their skills:</p> <ul style="list-style-type: none">▪ Training is required to participate in the CERT program.▪ Other training is recommended and may be required by a local program.▪ Other training is optional and may be offered by a local program.▪ Exercises are used to refresh skills and keep them current. <p>Training</p> <p>Ask participants:</p> <p>What training is required to participate in the CERT program?</p> <p>Summarize the discussion by listing required training:</p> <ul style="list-style-type: none">▪ All volunteers must complete <i>CERT Basic Training</i>.▪ The Course Manager and instructors for <i>CERT Basic Training</i> must complete <i>CERT Train-the-Trainer</i>.<ul style="list-style-type: none">• Note: Individuals who conduct only one or two of the units may do so without taking the <i>CERT Train-the-Trainer</i> course.• However, they should be briefed on CERT, the <i>CERT Basic Training</i> course, and how the unit they are teaching fits into the course.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 7-7</p> <p>This slide is animated. This first click displays the question.</p> <p>Conduct a class discussion by asking this question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p> <p>PM, P. 7-4 and 7-5</p>	<p>Ask participants:</p> <p>What training courses are recommended for CERT members?</p> <p>Note: Some local programs may require some of these.</p> <p>Summarize the discussion by listing recommended training:</p> <ul style="list-style-type: none">▪ FEMA IS-100.b: <i>Introduction to Incident Command System (ICS)</i>▪ FEMA IS-200.b: <i>ICS for Single Resources</i>▪ FEMA IS-700: <i>National Incident Management System (NIMS) Introduction</i>▪ FEMA IS-800.b: <i>National Response Framework Introduction</i>▪ CPR/AED: Cardiopulmonary resuscitation/automated external defibrillator training <p>Explain that the FEMA Independent Study courses can be completed online at http://training.fema.gov/emiweb/is.</p> <p>Explain that, in addition to the required and recommended training courses, there are a number of other training opportunities that a local CERT program may offer.</p> <p>Refer participants to <i>Training Opportunities</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Review the job aid with participants.</p>

PM, P. 7-4 and 7-5	Training Opportunities
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Required Training

- *CERT Basic Training*
- The Course Manager and instructors for *CERT Basic Training* must complete *CERT Train-the-Trainer*.
 - Note: Individuals who conduct only one or two of the units may do so without taking the *CERT Train-the-Trainer* course. However, they should be briefed on CERT, the *CERT Basic Training* course, and how the unit they are teaching fits into the course.

Recommended Training

- FEMA IS-100.b: *Introduction to Incident Command System (ICS)*
- FEMA IS-200.b: *ICS for Single Resources*
- FEMA IS-700: *National Incident Management System (NIMS) Introduction*
- FEMA IS-800.b: *National Response Framework Introduction*
- CPR/AED: Cardiopulmonary resuscitation/automated external defibrillator training
 - Note: The FEMA Independent Study courses can be completed online at <http://training.fema.gov/emiweb/is>.

CERT Supplemental Training Modules

- *Animal Response I*: General animal behavior, disaster planning for your animals, animal issues in emergency management
- *Animal Response II*: Knowledge and skills a CERT member would need when handling and caring for animals in an emergency
- *CERT Emergency Communications*: Emergency modes and technologies, proper radio use, how a CERT member participates in Net Operations
- *CERT Traffic and Crowd Management*: Hand signals and communication skills when working with traffic and crowd situations, maintaining safety when managing traffic and crowds

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

- *Flood Response for CERTs*: How emergency management responds to floods, working safely around floodwaters, how to fill and move sandbags and build a sandbag barrier correctly and safely
- *CERT Tools for Leadership Success*: The characteristics and responsibilities of team leaders and team members, team interactions, leadership styles, and how to lead successfully

Other CERT Training

- FEMA IS-317: *Introduction to Community Emergency Response Teams*
(An introduction to CERT for anyone interested in CERT or as a refresher for current team members)
- Search and rescue tutorial on CERT Web site

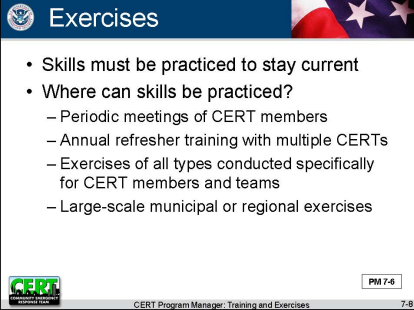
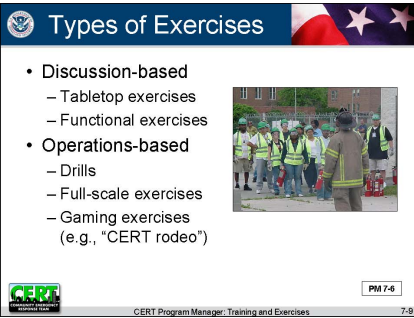
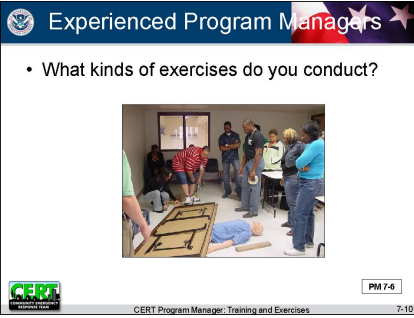
Training That May Be Arranged by Local Program

- Advanced first aid techniques
- Advanced search and rescue
- Community relations
- Damage assessment
- Debris removal
- Donations management
- Shelter management
- Special needs concerns
- Utilities control
- Wild land firefighting assistance

Local public and private agencies may have training that, if modified, would be useful for CERT volunteers (utility companies, Humane Society, ARES/RACES [amateur radio], police departments, National Weather Service, mental health departments, and more).

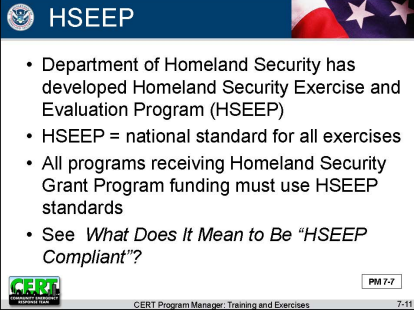
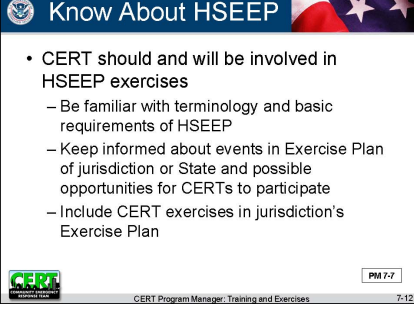
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Exercises</p> <ul style="list-style-type: none">• Skills must be practiced to stay current• Where can skills be practiced?<ul style="list-style-type: none">– Periodic meetings of CERT members– Annual refresher training with multiple CERTs– Exercises of all types conducted specifically for CERT members and teams– Large-scale municipal or regional exercises <p><small>CERT Program Manager: Training and Exercises PM 7-6 7-8</small></p>	<h3>Exercises</h3> <p>Tell participants that just providing the initial training is not the end of the story. For skills to stay current they must be practiced. Skills can be practiced at:</p> <ul style="list-style-type: none">▪ Periodic meetings of CERT members▪ An annual refresher training with multiple CERTs▪ Exercises of all types conducted specifically for CERT members and teams▪ Large-scale municipal or regional exercises
<p>Display Slide 7-8</p>  <p>Types of Exercises</p> <ul style="list-style-type: none">• Discussion-based<ul style="list-style-type: none">– Tabletop exercises– Functional exercises• Operations-based<ul style="list-style-type: none">– Drills– Full-scale exercises– Gaming exercises (e.g., "CERT rodeo") <p><small>CERT Program Manager: Training and Exercises PM 7-6 7-9</small></p>	<p>Explain that all types of exercises will help maintain and expand CERT members' skills and team capabilities. Exercises include:</p> <ul style="list-style-type: none">▪ Discussion-based exercises<ul style="list-style-type: none">• Tabletop exercises• Functional exercises▪ Operations-based exercises<ul style="list-style-type: none">• Drills• Full-scale exercises• Gaming exercises (e.g., "CERT rodeo")
<p>Display Slide 7-9</p>  <p>Experienced Program Managers</p> <ul style="list-style-type: none">• What kinds of exercises do you conduct? <p><small>CERT Program Manager: Training and Exercises PM 7-6 7-10</small></p>	<p>Ask experienced Program Managers:</p> <p>What kinds of exercises do you conduct?</p>
<p>Display Slide 7-10</p> <p>Record responses on an easel pad and discuss.</p>	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>HSEEP</p> <ul style="list-style-type: none">• Department of Homeland Security has developed Homeland Security Exercise and Evaluation Program (HSEEP)• HSEEP = national standard for all exercises• All programs receiving Homeland Security Grant Program funding must use HSEEP standards• See <i>What Does It Mean to Be “HSEEP Compliant”?</i> <p><small>CERT Program Manager: Training and Exercises 7-11</small></p> <p>Display Slide 7-11</p> <p>Participants can read the full description in the Participant Manual.</p>	<p><u>Homeland Security Exercise and Evaluation Program</u></p> <p>Explain that the Department of Homeland Security has developed the Homeland Security Exercise and Evaluation Program (HSEEP).</p> <ul style="list-style-type: none">▪ “The Homeland Security Exercise and Evaluation Program (HSEEP) is a capabilities- and performance-based exercise program that provides a standardized methodology and terminology for exercise design, development, conduct, evaluation, and improvement planning.” (from HSEEP Web site https://hseep.dhs.gov/pages/1001_About.aspx)▪ In other words, HSEEP is a national standard for all exercises.▪ All programs receiving Homeland Security Grant Program funding must use HSEEP standards.
 <p>Know About HSEEP</p> <ul style="list-style-type: none">• CERT should and will be involved in HSEEP exercises<ul style="list-style-type: none">– Be familiar with terminology and basic requirements of HSEEP– Keep informed about events in Exercise Plan of jurisdiction or State and possible opportunities for CERTs to participate– Include CERT exercises in jurisdiction’s Exercise Plan <p><small>CERT Program Manager: Training and Exercises 7-12</small></p> <p>Display Slide 7-12</p> <p>PM, P. 7-8 and 7-9</p> <p>Emphasize this point.</p>	<p>Explain that CERT Program Managers need to be aware of HSEEP because CERT should and will be involved in HSEEP exercises. CERT Program Managers should:</p> <ul style="list-style-type: none">▪ Be familiar with the terminology and basic requirements of HSEEP.▪ Keep informed about events in the Exercise Plan of their jurisdiction or State and possible opportunities for CERTs to participate.▪ Be sure that exercises conducted by their CERT program are included in the jurisdiction’s Exercise Plan. <p>Refer participants to <i>What Does It Mean to Be “HSEEP Compliant”?</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Invite participants to review the material themselves to become familiar with HSEEP.</p> <p>Emphasize that the best way for CERT Program Managers to meet HSEEP standards is to work with their local jurisdiction’s training and exercise plan manager.</p>

PM, P. 7-8 and 7-9

What Does It Means to Be “HSEEP Compliant”?

HSEEP compliance involves four steps:

1. Development and maintenance of an annual Training and Exercise Plan Workshop (T&EPW) and Multi-Year Training and Exercise Plan, to include use of the National Exercise Schedule (NEXS)
2. Planning and designing exercises in accordance with HSEEP Volumes I-IV, to include the development of documentation and following of planning timelines
3. Development and submission of an After-Action Report (AAR)
4. Implementation of action items identified in the Improvement Plan

These four steps are cyclical and lead to the successful implementation of a self-sustaining exercise program. Below is an overview of tasks that must be accomplished for an entity to be HSEEP compliant.

Training and Exercise Plan Workshop (T&EPW)

Every State and Urban Area must conduct an Exercise Plan Workshop each calendar year. As a result of the T&EPW, each State or Urban Area will develop/update its Multi-Year Training and Exercise Plan. The Training and Exercise Plan will include the State or Urban Area's training and exercise priorities (based on the homeland security strategy and previous year improvement plans), associated training and exercise capabilities, and a multi-year training and exercise schedule. The schedule should reflect all exercises that are being conducted throughout the State, not just those that are sponsored by Preparedness Directorate. The new Multi-Year Training and Exercise Plan must be submitted to Preparedness Directorate within 60 days of the workshop.

All exercises included in the Training and Exercise Plan must be entered through the NEXS system. This list must be updated at least quarterly to reflect schedule changes. States are responsible for ensuring all exercises are placed on the schedule; this includes exercises conducted using Preparedness Directorate-approved direct support.

Exercises

The scenarios used in Homeland Security Grant Program (HSGP)-funded exercises must focus on validating existing capabilities (e.g., training, equipment, plans) and must be large enough in scope and size to exercise several tasks and involve multiple jurisdictions and disciplines. Exercise scenarios should be based on the State or Urban Area Homeland Security Strategy, including threat and vulnerability assessments. The type of exercise selected should be based on the Multi-Year Training and Exercise Plan. Exercises must be capability and performance based. Every State and Urban Area is required to follow HSEEP Volumes I-IV for the development of exercise documentation. Exercises should adhere to HSEEP planning timelines. Exercises must be National Incident Management System (NIMS)-compliant, as outlined in the "State and Territorial Compliance Activities: Federal Fiscal Year 2006" and "Tribal Government and Local Jurisdiction Compliance Activities: Federal Fiscal Year 2006" documents.

After-Action Reporting

After-Action Reports (AARs)/Improvement Plans created for exercises are required to comply with the guidance set forth in the HSEEP Volumes and to use the report template provided. AARs/Improvement Plans must be based on information gathered through Exercise Evaluation Guides (EEGs) found in the HSEEP Volume IV Library. States and Urban Areas must conduct an After-Action Conference, in which key personnel and the Exercise Planning Team are presented with findings and recommendations from the draft AAR/Improvement Plan. AARs/Improvement Plans must be provided to Preparedness Directorate within 60 days of each exercise. The AARs/Improvement Plans should be submitted via the HSEEP Web page.

Improvement Planning

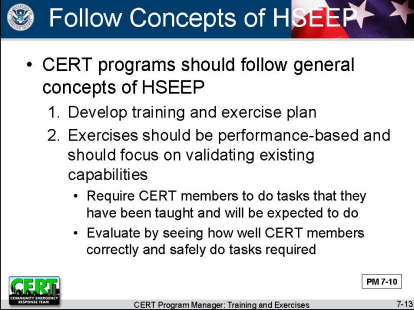
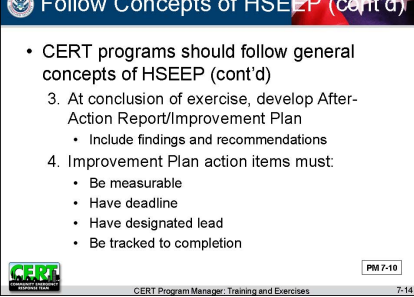

Improvement Plans must include input from the affected jurisdictions, usually captured at the After-Action Conference. Action items for inclusion in the Improvement Plan must include the following characteristics:

- They must be measurable.
- They must have a deadline.
- They must have a designated lead (either by name or by agency).
- They must be tracked to completion.

From FEMA, Homeland Security Exercise and Evaluation Program Web site
(About HSEEP, Frequently Asked Questions)
https://hseep.dhs.gov/pages/1001_HSEEP5.aspx#q14


COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>• CERT programs should follow general concepts of HSEEP</p> <ol style="list-style-type: none">1. Develop training and exercise plan2. Exercises should be performance-based and should focus on validating existing capabilities<ul style="list-style-type: none">• Require CERT members to do tasks that they have been taught and will be expected to do• Evaluate by seeing how well CERT members correctly and safely do tasks required <p><small>CERT Program Manager: Training and Exercises 7-13</small></p>	<p>Explain that CERT programs also should follow the general concepts of HSEEP:</p> <ul style="list-style-type: none">▪ They should develop a training and exercise plan.▪ Exercises should be performance-based and should focus on validating existing capabilities:<ul style="list-style-type: none">• The scenarios should require CERT members to do tasks that they have been taught and will be expected to do.• The exercise should be evaluated by seeing how well CERT members correctly and safely do the tasks required by the exercise scenario.
<p>Display Slide 7-13</p>	
 <p>• CERT programs should follow general concepts of HSEEP (cont'd)</p> <ol style="list-style-type: none">3. At conclusion of exercise, develop After-Action Report/Improvement Plan<ul style="list-style-type: none">• Include findings and recommendations4. Improvement Plan action items must:<ul style="list-style-type: none">• Be measurable• Have deadline• Have designated lead• Be tracked to completion <p><small>CERT Program Manager: Training and Exercises 7-14</small></p>	<ul style="list-style-type: none">▪ At the conclusion of an exercise, an After-Action Report/Improvement Plan should be developed.<ul style="list-style-type: none">• The report should include findings and recommendations.▪ The Improvement Plan should include action items that:<ul style="list-style-type: none">• Are measurable• Have a deadline• Have a designated lead• Are tracked to completion
<p>Display Slide 7-14</p>	
	<p>Say that in the final section of this unit you will review how to develop a training and exercise plan that is mindful of the requirements of HSEEP.</p> <p>Remind participants that, as a matter of HSEEP compliance and in addition to implementing a CERT training and exercise plan, they need to be sure that exercises conducted by their program are included in the jurisdiction's Exercise Plan.</p> <p>Before moving on to talk about tailoring training, is there anything that experienced Program Managers want to add about the types of training and exercises in a CERT program?</p>



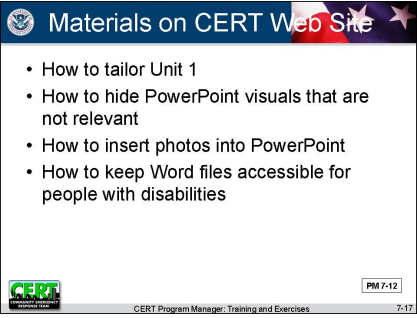
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 7-15</p>	<h3><i>Tailoring CERT Basic Training</i></h3> <p>Tell participants that the <i>CERT Basic Training</i> materials use an all-hazards approach and are intended for a national audience. To make the materials relevant for situations that local CERTs will encounter, the CERT program needs to tailor them.</p> <p>Caution participants that tailoring the training does not mean eliminating topics. New content may be added and existing content should be tailored, but all existing topics must be covered.</p> <p>List the ways that the materials need to be tailored:</p> <ul style="list-style-type: none">▪ For local hazards (Unit 1)<ul style="list-style-type: none">• Use the threats the community may face. For example, in Missouri, hurricanes are not a concern but flooding is and earthquakes might be.▪ For local resources<ul style="list-style-type: none">• Learn about the first responder resources that the community has and refer to them correctly.▪ For local protocols, procedures, and terminology<ul style="list-style-type: none">• Because teams are local resources, they need to interact effectively with local agencies using local standards, protocols, and terminology.▪ For the audience<ul style="list-style-type: none">• Learn the audience's concerns and abilities and modify the training to fit them. How one teaches leveraging and cribbing will be different for a group in a retirement community than for a group of young professionals at a corporate headquarters. Other concerns could relate to culture, age, language, or venue (e.g., neighborhood, workplace, school).

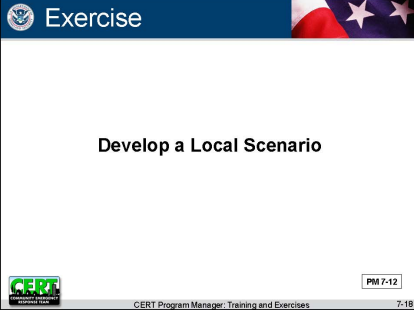
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
  <p>Display Slide 7-16</p>  <p>Display Slide 7-17</p>	<ul style="list-style-type: none">▪ For the training facility<ul style="list-style-type: none">• Some facilities do not have all the space that would be optimal for the hands-on exercises. The Program Manager may need to be creative in how the space is used. <p>Ask participants for examples of accommodations they have used to conduct training in less than optimal facilities.</p> <p>Tell participants to review the <i>CERT Basic Training</i> materials carefully both to familiarize themselves with the course content and to identify areas that require tailoring. They should make sure to review the Instructor Guide, the Participant Manual, and the PowerPoint visuals. Changes may need to be made in all three.</p> <p>Say that materials can be customized with local:</p> <ul style="list-style-type: none">▪ Case studies▪ Scenarios▪ Photographs▪ Anecdotes▪ Examples▪ Success stories▪ Handouts <p>Refer participants to the CERT Web site for numerous tips on tailoring CERT training:</p> <ul style="list-style-type: none">▪ How to tailor Unit 1▪ How to hide PowerPoint visuals that are not relevant▪ How to insert photos into PowerPoint▪ How to keep Word files accessible for people with disabilities <p>www.citizencorps.gov/cert/start-1-5a.shtm</p>

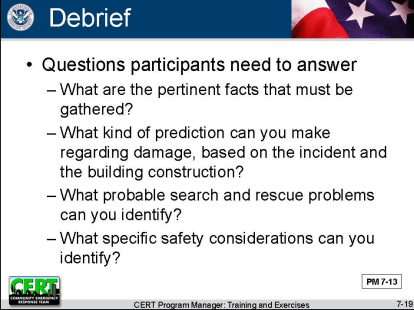
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Develop a Local Scenario</p> <p>CERT COMMUNITY EMERGENCY RESPONSE TEAM</p> <p>CERT Program Manager: Training and Exercises 7-18</p> <p>Display Slide 7-18</p> <p>PM, P. 7-13</p>	<p>Exercise: Develop a Local Scenario</p> <p>Purpose: This exercise allows participants to develop a local scenario for an activity in Unit 5 of <i>CERT Basic Training</i>.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Tell participants that they will work individually.2. Refer participants to <i>Develop a Local Scenario</i> in the Participant Manual and on the following page in the Instructor Guide.3. Read the background.4. Review the instructions.<ol style="list-style-type: none">a. Develop one scenario that would be appropriate for your community.b. Include the elements in the list.c. Think about the questions that the <i>CERT Basic Training</i> participants need to answer and make sure that you include the information they would need.d. Identify 2-3 photos that might be presented as part of the scenario.e. Write the scenario on a blank piece of paper or in Section 7 of your Draft Program Plan.f. You have 10 minutes.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Debrief</p> <ul style="list-style-type: none">• Questions participants need to answer<ul style="list-style-type: none">– What are the pertinent facts that must be gathered?– What kind of prediction can you make regarding damage, based on the incident and the building construction?– What probable search and rescue problems can you identify?– What specific safety considerations can you identify? <p>Display Slide 7-19</p>	<p>Debrief:</p> <ol style="list-style-type: none">1. Ask for 2-3 people to volunteer to read their scenarios.2. Ask the group to listen to the scenario and determine if they could answer the questions that the <i>CERT Basic Training</i> participants will need to answer. The questions are included on the slide.3. Ask for any suggestions for improving the scenarios.

PM, P. 7-13	Develop a Local Scenario
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Background:

In *CERT Basic Training* Unit 5, Light Search and Rescue Operations, there is an activity on search and rescue sizeup. The activity is done in small groups and each small group is provided with a local scenario (if possible with photos) describing a local building in a disaster event that is realistic for the community. The *CERT Basic Training* participants are asked to answer four questions:


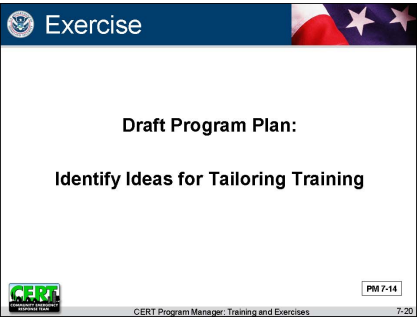
- What are the pertinent facts that must be gathered?
- What kind of prediction can you make regarding damage, based on the incident and the building construction?
- What probable search and rescue problems can you identify?
- What specific safety considerations can you identify?

In preparation for this activity, the instructor must develop the scenarios to be used. The following elements are to be included in the scenarios:

- Type of event
- Intensity/severity/duration
- Occupancy affected
- Current/forecast weather conditions
- Time of day and week
- Other factors that may affect search and rescue operations

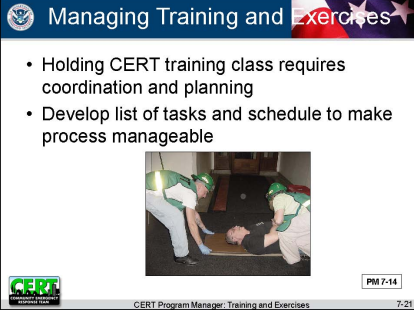

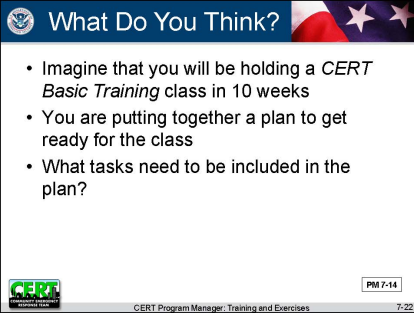
Instructions:

1. Develop one scenario that would be appropriate for your community.
2. Include the elements in the list.
3. Think about the questions that the *CERT Basic Training* participants need to answer and make sure that you include the information they would need.
4. Identify 2-3 photos that might be presented as part of the scenario.

INSTRUCTOR GUIDANCE	CONTENT
  <p>Display Slide 7-20</p> <p>If you are short on time, point out this section and ask participants to complete it on their own.</p>	<p>Before moving on to talk about managing and scheduling training, is there anything that experienced Program Managers want to add about tailoring <i>CERT Basic Training</i>?</p> <p>Exercise: Draft Program Plan: Identify Ideas for Tailoring Training</p> <p>Purpose: This exercise allows Program Managers to record ideas they might have for tailoring training to their own community.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. 2. Ask participants to enter ideas in the seventh section, <i>Training and Exercises</i>, individually. The title is “Some ideas for tailoring training to my community.”

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Managing Training and Exercises</p> <ul style="list-style-type: none">• Holding CERT training class requires coordination and planning• Develop list of tasks and schedule to make process manageable  <p>CERT Program Manager: Training and Exercises 7:21</p>	<h3><i>Managing Training and Exercises</i></h3> <p>Tell participants that holding a CERT training class requires coordination and planning. The job can feel overwhelming when a Program Manager first gets started. Developing a list of tasks and a schedule helps make the process manageable.</p>
<p>Display Slide 7-21</p>  <p>What Do You Think?</p> <ul style="list-style-type: none">• Imagine that you will be holding a <i>CERT Basic Training</i> class in 10 weeks• You are putting together a plan to get ready for the class• What tasks need to be included in the plan? <p>CERT Program Manager: Training and Exercises 7:22</p>	<p>Say to participants:</p> <p>Imagine that you will be holding a <i>CERT Basic Training</i> class in 10 weeks. You are putting together a plan to get ready for the class. What tasks need to be included in the plan?</p>
<p>Display Slide 7-22</p> <p>Record responses on an easel pad. You may need to prompt participants by asking them to look over the list and make sure everything is on it.</p> <p>There is no “right” answer for this exercise, but make sure that these topics are addressed:</p> <ul style="list-style-type: none">▪ Participants▪ Instructors▪ Facility▪ Equipment▪ Materials▪ Supplies	

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
<p>• Now that we have identified the tasks, we need to develop a schedule</p> <p>• Let's figure out what needs to happen week by week</p> <p>• What things on this list need to happen 8 weeks before the class?</p> <p>Display Slide 7-23</p> <p>PM, P. 7-15 and 7-16</p> <p>Record responses on an easel pad. Make sure that all participants understand what is involved in each task as you put it on the schedule.</p> <p>Repeat for each week (7, 6, 5, 4, 3, 2, 1). The group may end up moving some things around as you go.</p> <p>Encourage experienced Program Managers to share their experiences about how things really work.</p>	<p>Say to participants:</p> <p>Now that we have identified the tasks, we need to develop a schedule. Let's figure out what needs to happen week by week.</p> <p>What things on the list need to happen 8 weeks before the class?</p> <p>Refer participants to the <i>Sample Training Schedule</i> worksheet in the <i>Draft Program Plan</i> in Unit 1 (or they can use copy of the worksheet on p. 7-15 and 7-16) of the Participant Manual and on the following pages of the Instructor Guide. Tell participants to fill in the worksheet as you work through Week 8 to Week 1.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

PM, P. 7-15 and 7-16

Sample Training Schedule

Week 8 Before Training	Week 7 Before Training	Week 6 Before Training	Week 5 Before Training

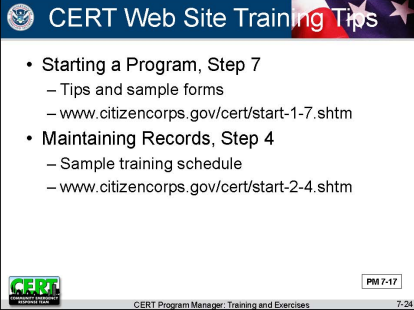

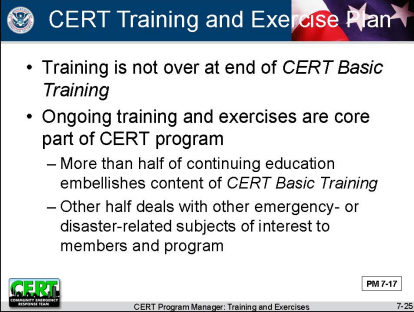
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

Week 4 Before Training	Week 3 Before Training	Week 2 Before Training	Week 1 Before Training

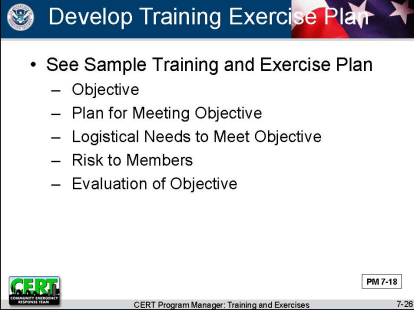
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>CERT Web Site Training Tips</p> <ul style="list-style-type: none">• Starting a Program, Step 7<ul style="list-style-type: none">– Tips and sample forms– www.citizencorps.gov/cert/start-1-7.shtm• Maintaining Records, Step 4<ul style="list-style-type: none">– Sample training schedule– www.citizencorps.gov/cert/start-2-4.shtm <p>Display Slide 7-24</p> 	<h3>Training Tips and Forms</h3> <p>Tell participants that there are resources on the CERT Web site that are very useful for the new Program Manager who is coordinating training for the first time.</p> <ul style="list-style-type: none">▪ Starting a Program, Step 7, includes tips and sample forms. www.citizencorps.gov/cert/start-1-7.shtm▪ Maintaining Records, Step 4, also has a sample training schedule. www.citizencorps.gov/cert/start-2-4.shtm <p>Before moving on to talk about the training plan, are there any questions about training logistics and the schedule?</p>
 <p>CERT Training and Exercise Plan</p> <ul style="list-style-type: none">• Training is not over at end of <i>CERT Basic Training</i>• Ongoing training and exercises are core part of CERT program<ul style="list-style-type: none">– More than half of continuing education embellishes content of <i>CERT Basic Training</i>– Other half deals with other emergency- or disaster-related subjects of interest to members and program <p>Display Slide 7-25</p>	<h3><i>The CERT Training and Exercise Plan</i></h3> <p>Remind participants that, as discussed earlier, training is not done once the <i>CERT Basic Training</i> course is complete. Ongoing training and exercises are a core part of the CERT program. More than half of continuing education deals with enriching what was taught in the <i>CERT Basic Training</i> course; the other half deals with other emergency- or disaster-related subjects that weren't addressed in the <i>CERT Basic Training</i> course but are of interest to members and the program.</p> <p>Explain that, whatever the overall objectives may be, all CERT training and exercises should be incorporated into the local CERT program plan.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>• See Sample Training and Exercise Plan</p> <ul style="list-style-type: none">- Objective- Plan for Meeting Objective- Logistical Needs to Meet Objective- Risk to Members- Evaluation of Objective <p>Display Slide 7-26</p> <p>PM, P. 7-18</p>	<p>Tell participants that you are going to show them a sample training and exercise plan template. Then you will walk through the plan with participants and discuss each of the elements.</p> <p>Refer participants to the <i>Sample Training and Exercise Plan</i> template in the Participant Manual and on the following page in the Instructor Guide.</p> <p>Point out the five columns:</p> <ol style="list-style-type: none">1. Objective2. Plan for Meeting Objective3. Logistical Needs to Meet Objective4. Risk to Members5. Evaluation of Objective <p>Tell participants to use the plan as a guide as you continue with the unit instruction.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

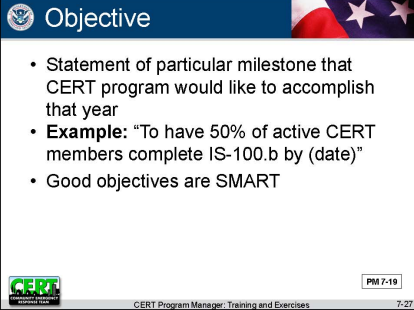
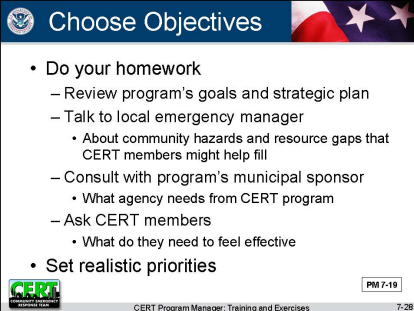
PM, P. 7-18

Sample Training and Exercise Plan

Objective	Plan for Meeting Objective	Logistical Needs to Meet Objective	Risk to Members	Evaluation of Objective


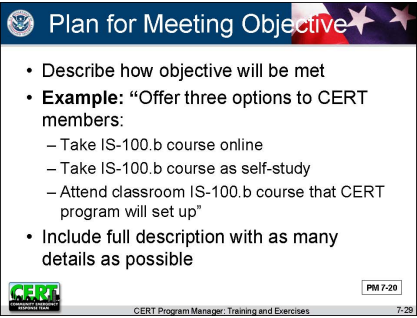
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Objective</p> <ul style="list-style-type: none">• Statement of particular milestone that CERT program would like to accomplish that year• Example: "To have 50% of active CERT members complete IS-100.b by (date)"• Good objectives are SMART <p><small>CERT Program Manager: Training and Exercises 7-27</small></p> <p>Display Slide 7-27</p>	<p>Objective</p> <p>Explain that the first step in developing a training and exercise plan is to develop objectives. An objective is a statement of a particular milestone that a CERT program would like to accomplish that year.</p> <p><u>Example</u></p> <p>Tell participants to write this in the Objective column: "To have 50% of active CERT members complete IS-100.b (<i>Introduction to Incident Command System</i>) by (date)."</p> <p>Remind participants that good objectives are SMART:</p> <ul style="list-style-type: none">▪ Simple▪ Measurable▪ Achievable▪ Realistic▪ Timely
 <p>Choose Objectives</p> <ul style="list-style-type: none">• Do your homework<ul style="list-style-type: none">– Review program's goals and strategic plan– Talk to local emergency manager<ul style="list-style-type: none">• About community hazards and resource gaps that CERT members might help fill– Consult with program's municipal sponsor<ul style="list-style-type: none">• What agency needs from CERT program– Ask CERT members<ul style="list-style-type: none">• What do they need to feel effective• Set realistic priorities <p><small>CERT Program Manager: Training and Exercises 7-28</small></p> <p>Display Slide 7-28</p>	<p><u>How to Choose Objectives</u></p> <p>Tell participants that identifying objectives should not be a haphazard process. A CERT program's annual training and exercise objectives are tied to and compatible with the program's goals and strategic plan. They also are tied to the community's most recent risk assessment.</p> <p>Tell participants to do their homework before identifying annual objectives:</p> <ul style="list-style-type: none">▪ Review the program's goals and strategic plan (drafted in Unit 2 of the course). <p>(continued)</p> <ul style="list-style-type: none">▪ Talk to the local emergency manager about the

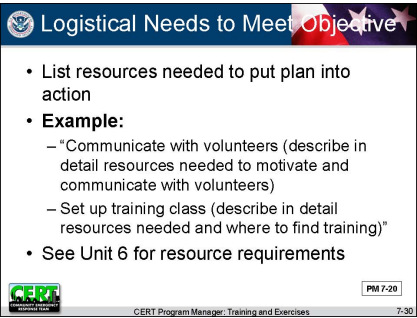

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
  <p>Display Slide 7-29</p>	<p>hazards that are a priority for the community and about resource gaps that CERT members might help fill.</p> <ul style="list-style-type: none">▪ Consult with the program’s municipal sponsor. Make sure that the program’s training and exercise objectives are in sync with what that agency is doing and what the agency needs from the CERT program.▪ Ask CERT members what additional training will make them more effective in a disaster. They will know what they need. Remember that one size does not fit all. A team of senior citizens needs different types of continuing training than does a student team at the local high school. <p>Say that, after the research is complete, the program needs to review the possibilities and set priorities for what the program can realistically accomplish.</p> <p>Do experienced Program Managers have anything to add about setting objectives for the training and exercise plan?</p> <p>Plan for Meeting an Objective</p> <p>Say that the next step is to describe how the objective will be met.</p> <p><u>Example</u></p>

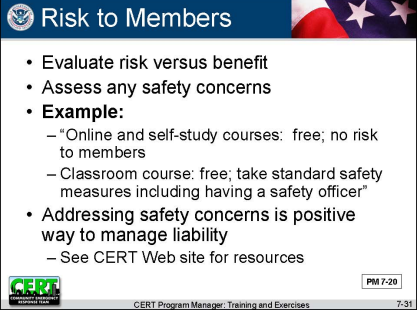
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 7-30</p> 	<p>Tell participants to write this in the Plan for Meeting Objective column:</p> <p>“Offer three options to CERT members:</p> <ol style="list-style-type: none">1. Take IS-100.b course online2. Take IS-100.b course as self-study3. Attend classroom IS-100.b course that CERT program will set up” <p>Tell participants that the plan should include a full description with as many details as possible.</p> <p>Logistical Needs to Meet Objective</p> <p>Say that in the logistical needs column the Program Manager should list the resources that would be needed to put the plan into action.</p> <p><u>Example</u></p> <p>Tell participants to write this in the Logistical Needs to Meet Objective column:</p> <ul style="list-style-type: none">▪ “Communicate with volunteers (describe in detail resources needed to motivate volunteers to take the course and to communicate with the volunteers about how to access the course).▪ Set up training class (describe in detail the resources needed – materials, supplies, equipment, instructional skills, financial – as well as ideas for where you can find the training).” <p>Refer participants to Unit 6, Procuring and Managing Resources, for the discussion of resource requirements.</p> <p>Do experienced Program Managers have anything to add about logistical needs to meet the objectives for the training and exercise plan?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Risk to Members</p> <ul style="list-style-type: none">• Evaluate risk versus benefit• Assess any safety concerns• Example:<ul style="list-style-type: none">– “Online and self-study courses: free; no risk to members– Classroom course: free; take standard safety measures including having a safety officer”• Addressing safety concerns is positive way to manage liability<ul style="list-style-type: none">– See CERT Web site for resources <p>Display Slide 7-31</p> <p>PM, P. 7-21 and 7-22</p>	<h3>Risk to Members</h3> <p>Say that the Risk to Members column is where the Program Manager should evaluate risk versus benefit. In particular, the Program Manager should assess any safety concerns.</p> <p><u>Example</u></p> <p>Tell participants to write this in the Risk to Members column:</p> <ul style="list-style-type: none">▪ “Online and self-study courses: free; no risk to members▪ Classroom course: free; take standard safety measures including having a safety officer.” <p>Point out that in this example the risk analysis will not show any unusual risk to taking the IS 100 course.</p> <p>Say that the result would be different if the objective was to train CERT volunteers in swift water rescue. In this instance, the physical risks and the cost could well outweigh the benefits. That risk assessment would influence whether the objective was adopted or not.</p> <p>Say that managing liability is a serious concern for CERT Program Managers. Addressing safety concerns during training and exercises is a positive way to reduce liability through risk management. There are several resources for Program Managers on the CERT Web site at www.citizencorps.gov/cert/start-3-1d.shtm.</p> <p>Refer participants to <i>Reducing Risk and Liability During Training and Exercises</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Tell participants to use this job aid to identify any safety concerns for the training and exercise plan.</p>

PM, P. 7-21 and 7-22	Reducing Risk and Liability During Training and Exercises
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Reducing Risk and Liability During Training: Instructors

Steps that you can take with your instructors to help reduce liability include:

- Establishing training standards and safety requirements for training.
- Briefing all instructors on their responsibilities to conduct safe and effective training.
- Ensuring that all instructors are prepared to meet the objectives for their sessions.
- Providing co-instructors to assist the instructors for all activities.
- Ensuring that all instructors model appropriate safety behavior, such as safety gear for all demonstrations.

Additionally, be sure that your instructors understand that they can give participants permission to opt out of an activity if they have a condition that they may aggravate by participating.

Reducing Risk and Liability During Training: Participants

Steps that you can take with CERT participants to help reduce liability include:

- Ensure that participants understand that they may opt out of activities if they have a condition that they may aggravate by participating.
- Require all participants to sign a hold harmless agreement. (See sample agreement in the resources.)
- Explain the potential hazards that participants may face in class activities, during exercises, and during activation.
- Provide copies of all CERT safety rules and requirements to each participant. Require them to sign one copy and return it to you before class begins. Encourage the participants to keep the other copy for their records.
- Require all participants to wear safety gear for all activities.
- When you see an unsafe act, correct it immediately!
- If someone is injured during class, document the injury and ensure that the participant receives appropriate medical treatment.
- Emphasize that rescuer safety is the primary concern in training and activation.

Reducing Risk and Liability During Training: Classroom/Exercise Areas

Steps that you can take to ensure that the CERT classroom and exercise area are safe include:

- Walk through the classroom and exercise area(s) before each class to identify and correct unsafe conditions.
- Check all equipment to ensure that it is in good working order.

Be sure to make these checks **before every class begins**.

Reducing Risk and Liability During Training: Materials

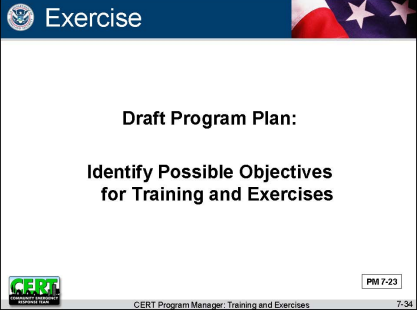
The main step to take to reduce liability related to the CERT materials is to ensure that you have written releases for all copyrighted materials (including photographs and cartoons). (Note that if you are using FEMA's materials without alteration, all necessary copyright releases have been secured.) Remember that photographs and other materials found on the Internet are copyrighted.

Reducing Liability: During Exercises

Always take the measures below to reduce liability during exercises:




- Conduct a pre-exercise briefing in which you provide the objectives (including safety objectives) for the exercise.
- Treat all drills, functional exercises, and full-scale exercises as the real thing. Enforce all safety rules strictly.
- Stress teamwork, safety equipment, and the use of the buddy system.
- If you see an unsafe act, intervene immediately!
- Conduct a post-exercise debriefing, and cover safety issues as part of the debriefing.
- Stress the need to document everything using the forms approved by the jurisdiction.
- If someone is injured, document the injury, and ensure that the volunteer receives appropriate medical care.

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="188 361 267 436" data-label="Image"> </div> <div data-bbox="188 548 604 861" data-label="Complex-Block"> <p>Evaluation of Objective</p> <ul style="list-style-type: none"> • After event has occurred <ul style="list-style-type: none"> – Observations – Lessons learned – Recommendations • Use information to write After-Action Report/Improvements Plan <p><small>CERT Program Manager: Training and Exercises 7-32</small></p> </div> <p data-bbox="188 877 462 913">Display Slide 7-32</p> <div data-bbox="188 997 604 1310" data-label="Complex-Block"> <p>Repeat Process Annually</p> <ul style="list-style-type: none"> • Revise Training and Exercise Plan once a year <ul style="list-style-type: none"> – Measure degree of achievement of previous year's objectives <ul style="list-style-type: none"> • Review successes and "less than successes" – Develop new objectives – Write plan for meeting objective – Identify logistical needs for meeting objective – Evaluate risk to members <p><small>CERT Program Manager: Training and Exercises 7-33</small></p> </div> <p data-bbox="188 1327 462 1362">Display Slide 7-33</p> <div data-bbox="188 1549 267 1625" data-label="Image"> </div>	<p data-bbox="630 361 1430 464">Do experienced Program Managers have anything to add about risk and safety issues during training and exercises?</p> <p data-bbox="630 554 987 590">Evaluation of Objective</p> <p data-bbox="630 604 1442 785">Finally, tell participants that in the Evaluation of Objective column they should enter their observations, lessons learned, and recommendations after the event has occurred. They will use this information to write an After-Action Report/Improvements Plan for the next event.</p> <p data-bbox="630 1001 1161 1037">Repeat Planning Process Annually</p> <p data-bbox="630 1052 1414 1155">Explain that planning for training and exercises is a cyclical process. Once a year the training and exercise plan should be revised.</p> <ul data-bbox="630 1178 1430 1507" style="list-style-type: none"> ▪ Measure the degree of achievement of previous year's objectives. <ul style="list-style-type: none"> • Review successes and "less than successes." ▪ Develop new objectives. ▪ Write a plan for meeting the objective. ▪ Identify the logistical needs for meeting the objective. ▪ Evaluate risk to members. <p data-bbox="630 1545 1377 1614">Before moving on, are there any questions about developing a training and exercise plan?</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 7-34</p> <p>If you are short on time, point out this section and ask participants to complete it on their own.</p>	<p>Exercise: Draft Program Plan: Identify Possible Objectives for Training and Exercises</p> <p>Purpose: This exercise allows Program Managers to record ideas they have for possible objectives for their training and exercise plan.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. 2. Ask participants to turn to the seventh section, <i>Training and Exercises</i>. In the Training and Exercise Plan they should enter ideas for objectives. Remind them that these objectives will have to be reviewed and checked with others in the program and the community (volunteers, sponsor, emergency manager).

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 7: TRAINING AND EXERCISES

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 630 401"> Unit Summary</p> <ul data-bbox="215 415 570 527" style="list-style-type: none">• CERT Training and Exercises• Tailoring <i>CERT Basic Training</i>• Managing Training and Exercises• The CERT Training and Exercise Plan <p data-bbox="191 646 630 688"> <small>CERT Program Manager: Training and Exercises</small> PM 7-24 7-35</p> <p data-bbox="191 705 461 741">Display Slide 7-35</p> <p data-bbox="191 789 269 863"></p>	<p data-bbox="659 359 914 401"><i>Unit Summary</i></p> <p data-bbox="659 415 1438 489">Tell participants that this unit has looked at training and exercises:</p> <ul data-bbox="659 506 1247 699" style="list-style-type: none">▪ CERT Training and Exercises▪ Tailoring <i>CERT Basic Training</i>▪ Managing Training and Exercises▪ The CERT Training and Exercise Plan <p data-bbox="659 783 1438 856">Do you have any questions about anything covered in this unit?</p> <p data-bbox="659 940 813 976">Transition</p> <p data-bbox="659 993 1455 1066">The next unit will discuss policies and procedures, which ones are needed and how to develop them.</p>

UNIT 8: POLICIES AND PROCEDURES

In this unit you will learn about:

- **Importance of Policies and Procedures.** Definitions of policy and procedure and why a CERT program needs to write down what it will do and how it plans to do it.
- **Policies and Procedures for CERT.** A review of the key policies and procedures that a CERT program needs to operate smoothly and effectively.
- **Resources for Developing Policies and Procedures.** Who needs to provide input when a policy or procedure is developed with special emphasis on addressing liability concerns.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

- Describe the role of policies and procedures in operating a local CERT program.
 - Explain why policies and procedures are necessary for running a successful program.
 - Identify policies and procedures necessary for starting and maintaining a program.
 - Identify resources for developing program policies and procedures.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- Importance of Policies and Procedures
- Policies and Procedures for CERT
- Resources for Developing Policies and Procedures
- Unit Summary

**ESTIMATED
COMPLETION
TIME**

1 hour

**TRAINING
METHODS**

The instructor begins the discussion of the importance of policies and procedures by defining the two terms and explaining that the terms are sometimes used interchangeably. The instructor explains that CERT Program Managers should focus not on the terms but on what the program's plans are and how they will be implemented.

Guidance for writing policies and procedures is provided. Experienced Program Managers are given suggestions for how to assess the effectiveness of policies and procedures.

Next the instructor and the class review and discuss a chart containing the key policies and procedures a CERT program should have and what elements they should include.

The final topic is resources for finding and developing policies and procedures. The instructor provides resources that should be consulted before developing policies and procedures. The instructor provides detailed information on developing policy and procedures that address liability.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

TRAINING METHODS (CONTINUED) Participants record ideas in the Draft Program Plan for what they need to research, whom they need to talk to, and any needs that are specific to their program.

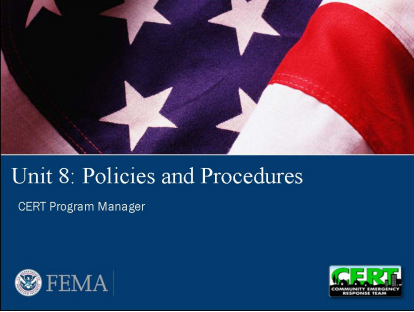
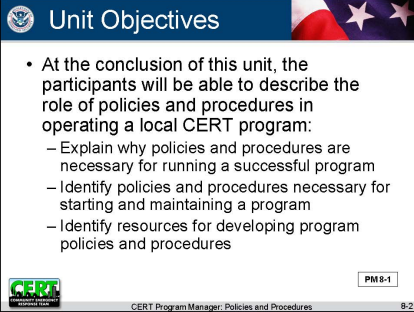
- RESOURCES REQUIRED**
- *Community Emergency Response Team Program Manager Instructor Guide (for instructors)*
 - *Community Emergency Response Team Program Manager Participant Manual (for participants)*
 - PowerPoint slides 8-1 to 8-19
-

- EQUIPMENT** The following equipment is required for this unit:
- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers
-

NOTES A suggested time plan for this unit is as follows:

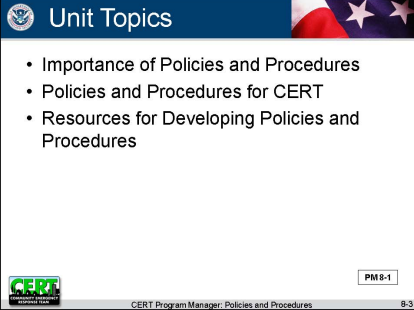
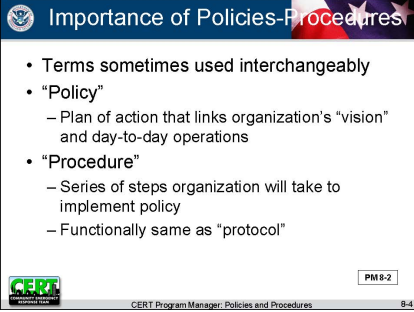
Unit Overview2 minutes
Importance of Policies and Procedures 15 minutes
Policies and Procedures for CERT 17 minutes
Resources for Developing Policies and Procedures20 minutes
Draft Program Plan: Develop Policies and Procedures5 minutes
Unit Summary1 minute
Total Time: 1 hour

Unit 8: Policies and Procedures

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 8-1</p>	<p>Unit Overview</p> <p>Say that a CERT program must have rules for how it operates. Policies and procedures provide details about those rules. This unit looks at:</p> <ul style="list-style-type: none"> ▪ The importance of policies and procedures ▪ The most important policies and procedures for a CERT program ▪ Some resources for developing policies and procedures
 <p>Display Slide 8-2</p>	<p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to describe the role of policies and procedures in operating a local CERT program:</p> <ul style="list-style-type: none"> ▪ Explain why policies and procedures are necessary for running a successful program. ▪ Identify policies and procedures necessary for starting and maintaining a program. ▪ Identify resources for developing program policies and procedures.









COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• Importance of Policies and Procedures• Policies and Procedures for CERT• Resources for Developing Policies and Procedures <p>CERT Program Manager: Policies and Procedures PM 8-1 B-3</p> <p>Display Slide 8-3</p>	<h3>Unit Topics</h3> <p>Say that, to meet the objectives, this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ Importance of Policies and Procedures▪ Policies and Procedures for CERT▪ Resources for Developing Policies and Procedures
 <p>Importance of Policies and Procedures</p> <ul style="list-style-type: none">• Terms sometimes used interchangeably• “Policy”<ul style="list-style-type: none">– Plan of action that links organization’s “vision” and day-to-day operations• “Procedure”<ul style="list-style-type: none">– Series of steps organization will take to implement policy– Functionally same as “protocol” <p>CERT Program Manager: Policies and Procedures PM 8-2 B-4</p> <p>Display Slide 8-4</p>	<h3><i>Importance of Policies and Procedures</i></h3> <p>Tell participants that there are two terms that Program Managers will hear. They are:</p> <ul style="list-style-type: none">▪ Policy▪ Procedure <p>Explain that the terms are sometimes used interchangeably and it is sometimes confusing to tell the terms apart. Provide participants with the following definitions for clarification:</p> <ul style="list-style-type: none">▪ Policy: A plan of action that links the organization’s “vision” and the day-to-day operations▪ Procedure: A series of steps the organization will take to implement a policy <p>Say that sometimes people also use the term “protocol.” Functionally it is the same as “procedure.” It describes the correct way to do something.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
<p> Important Thing to Remember</p> <ul style="list-style-type: none">• Don't worry about definitions• Bottom line: CERT program needs to know what it plans to do and how it plans to do it• Policies and procedures are required when there is need for consistency in day-to-day operational activities <p> <small>CERT Program Manager: Policies and Procedures</small> <small>PM 8-2</small></p>	<p>Tell participants NOT to focus on the definitions. The most important thing to remember is this: A CERT program needs to know what it plans to do and how it plans to do it. Policies and procedures are required when there is a need for consistency in day-to-day operational activities.</p>
<p>Display Slide 8-5</p>	
<p> Write Them Down</p> <ul style="list-style-type: none">• They are guideposts for program:<ul style="list-style-type: none">– Used to operate– Turned to whenever there is a question• They give guidance to staff and volunteers on how to perform job correctly <p></p> <p> <small>CERT Program Manager: Policies and Procedures</small> <small>PM 8-2</small></p>	<p>Say that those plans and steps need to be written down.</p> <ul style="list-style-type: none">▪ They will be the guideposts that the program:<ul style="list-style-type: none">• Uses to operate• Falls back on whenever there is a question▪ They give guidance to staff and volunteers so they know how to perform the job correctly.
<p>Display Slide 8-6</p>	
<p> Write Them Down (cont'd)</p> <ul style="list-style-type: none">• They help eliminate common misunderstandings<ul style="list-style-type: none">– Define roles and responsibilities– Establish boundaries <p></p> <p> <small>CERT Program Manager: Policies and Procedures</small> <small>PM 8-2</small></p>	<ul style="list-style-type: none">▪ They help eliminate common misunderstandings by defining roles and responsibilities and by establishing boundaries.
<p>Display Slide 8-7</p>	
<p>PM, P. 8-3</p>	<p>Refer participants to <i>Writing Policies and Procedures</i> in the Participant Manual and on the following page in the Instructor Guide.</p>

PM, P. 8-3	Writing Policies and Procedures
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Here are the major differences between policies and procedures.

Policies:




- Are general in nature
- Identify an organization's rule
- Explain why the rule exists
- Tell when the rule applies
- Describe whom it covers
- Show how the rule is enforced
- Describe the consequences of not following the rule
- Are normally described using simple sentences and paragraphs


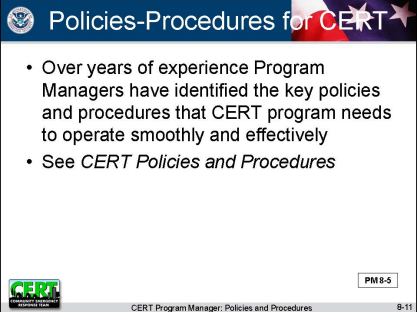
Procedures:

- Identify specific actions
- Explain when to take actions
- Describe alternatives, if applicable
- Show emergency procedures when the action can't be taken
- Include warning and cautions
- Give examples
- Show how to complete forms
- Are normally written using an outline format

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
<p>For Experienced PMs</p> <ul style="list-style-type: none">Periodically ask<ul style="list-style-type: none">Are policies and procedures still meeting program's needs?  <p><small>CERT Program Manager: Policies and Procedures PM8-4 B-8</small></p>	<p>Say that experienced Program Managers need to periodically ask: Are the policies and procedures still meeting the program's needs?</p>
<p>Display Slide 8-8</p> <p>"Signs"</p> <ul style="list-style-type: none">Some "signs" that review and update are needed<ul style="list-style-type: none">Increase in number of injuries?Ineffective team operations?More questions on "normal operations"?Feeling of general confusion?Inconsistent performance of CERT members?Increase in stress levels of CERT members?Complaints about poor performance?  <p><small>CERT Program Manager: Policies and Procedures PM8-4 B-9</small></p>	<p>Give some "signs" that policies and procedures need to be reviewed and updated:</p> <ul style="list-style-type: none">An increase in the number of injuries or ineffective team operationsMore questions on what are "normal operations" or a feeling of general confusionInconsistent performance of CERT membersIncrease in the stress levels of CERT membersComplaints about poor performance from the sponsoring agency, partners, or the community
<p>Display Slide 8-9</p> <p>Format</p> <ul style="list-style-type: none">Determined by program<ul style="list-style-type: none">One document with all policiesEach policy is its own documentNeed to be well written and complete  <p><small>CERT Program Manager: Policies and Procedures PM8-4 B-10</small></p>	<p>Explain that the format of policies and procedures is determined by the program. Whether they are included in one document or each one is its own document, they need to be well written and complete.</p>
<p>Display Slide 8-10</p> <p>PM, Additional Materials</p>	<p>Refer participants to the sample policies and procedures at the end of the unit in the "Additional Materials" section.</p>

INSTRUCTOR GUIDANCE	CONTENT
	<p>Before moving on to talk about the policies and procedures that need to be developed, is there anything that experienced Program Managers want to add about the importance of policies and procedures?</p>
 <p>Display Slide 8-11</p> <p>PM, P. 8-6 to 8-10</p>	<p><i>Policies and Procedures for CERT</i></p> <p>Say that, over years of experience, Program Managers have identified the key policies and procedures that a CERT program needs to operate smoothly and effectively.</p> <p>Refer participants to <i>CERT Policies and Procedures</i> in the Participant Manual and on the following pages in the Instructor Guide.</p> <p>Review and discuss the first two columns with participants, Policy/Procedure and Elements to Include. Say that you will talk about the third column, Development Resources, later.</p> <p>As you and the class review each policy in the chart, ask experienced Program Managers to add any thoughts they might have.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

PM, P. 8-6 to 8-10	CERT Policies and Procedures
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Policy/Procedure	Elements to Include	Development Resources
General Policies		
Program Membership	Qualifications for entering the program Documentation: application, background check, releases Minimum activity requirements Leaving the program	Local CERT program Sponsoring agency
Program Operation	Organizational structure (paid and volunteer) Program activities (disaster response, public service, community awareness) Relationship with sponsor	Local CERT program Sponsoring agency

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Policy/Procedure	Elements to Include	Development Resources
Training and Education	Documentation: registration, training and exercise plan, evaluation Data collected Training requirements (volunteers, instructors, Program Manager) Training offered Training activities (before, during, and after) Activities to ensure safety Credit for <i>CERT Basic Training</i> completed in CERT program in another jurisdiction	National CERT Program Local CERT program Sponsoring agency
Uniforms	What is issued What should be worn when How it should be returned	Local CERT program Sponsoring agency
Communications	How communication is handled in emergency and non-emergency situations	Local CERT program Sponsoring agency
Equipment	Requirements Who provides equipment Replacement requirements	Local CERT program Sponsoring agency

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Policy/Procedure	Elements to Include	Development Resources
Insurance and Liability	Requirement to carry health insurance Liability protections provided and in what situations	CERT Web site Local and State government
Privacy Protection	Information collected What the program does and does not do with the information HIPAA requirements	Local CERT program Sponsoring agency State government HIPAA
Code of Conduct	Expected behavior Behaviors that are subject to termination Grievance process	Local CERT program Sponsoring agency
Local and State policies that will apply to the CERT program	Workers' compensation Liability Local health regulations Good Samaritan law	Local and State government


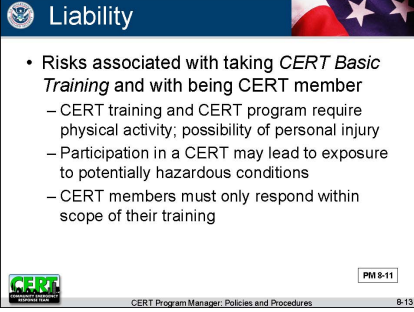
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

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Policy/Procedure	Elements to Include	Development Resources
Emergency Response Policies		
Credentialing and Identification	Requirements (how to obtain, how to display) Process for acquiring	Local CERT program Local and State government Emergency Operations Plans
Team Activation	NIMS and CERT Self-activation process Directed activation process	National Incident Management System (NIMS) www.fema.gov/emergency/nims/FAQ.shtm Emergency Operations Plans Local CERT program Sponsoring agency
Team Deployment	NIMS and CERT Appropriate behavior once deployed Team structure On-scene CERT management Safety concerns Restricted activities Documentation requirements	National Incident Management System (NIMS) www.fema.gov/emergency/nims/FAQ.shtm Emergency Operations Plans Local CERT program Sponsoring agency

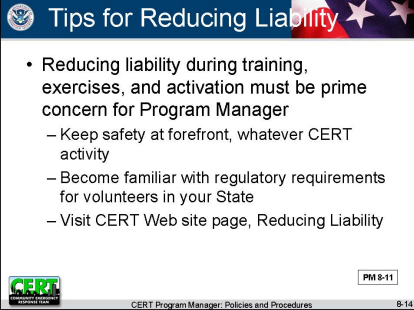
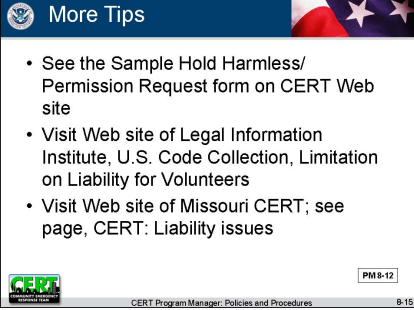
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Development Resources</p> <ul style="list-style-type: none">• CERT policies and procedures cannot be developed in a vacuum• Must be developed with input from sponsoring agency and partners• Need to be consistent with:<ul style="list-style-type: none">– Sponsoring agency's needs and procedures– EOP or CEMP– State and local statutes and regulations <p><small>CERT Program Manager: Policies and Procedures B-12</small></p> <p>Display Slide 8-12</p> <p>PM, P. 8-6 to 8-10</p>	<h3><i>Resources for Developing Policies and Procedures</i></h3> <p>Say that CERT policies and procedures cannot be developed in a vacuum. They must be developed with input from the program's sponsoring agency and operational partners so that all partners work well together. They need to be consistent with:</p> <ul style="list-style-type: none">▪ The sponsoring agency's needs and procedures▪ The Emergency Operations Plan (EOP) or Comprehensive Emergency Management Plan (CEMP), whichever the jurisdiction has▪ State and local statutes and regulations <p>Point out to participants that the third column of the chart indicates resources that should be consulted for input when developing that policy and/or procedure.</p>
 <p>Liability</p> <ul style="list-style-type: none">• Risks associated with taking <i>CERT Basic Training</i> and with being CERT member<ul style="list-style-type: none">– CERT training and CERT program require physical activity; possibility of personal injury– Participation in a CERT may lead to exposure to potentially hazardous conditions– CERT members must only respond within scope of their training <p><small>CERT Program Manager: Policies and Procedures B-13</small></p> <p>Display Slide 8-13</p>	<h3>Liability</h3> <p>Remind participants that liability has been discussed previously.</p> <p>Say that one policy area that is particularly important to a CERT program is liability. There are risks associated with taking <i>CERT Basic Training</i> and other training, and with being a CERT member.</p> <ul style="list-style-type: none">▪ The CERT training and the CERT program require physical activity with the possibility of personal injury.▪ Participation in a CERT may lead to exposure to potentially hazardous conditions.▪ A CERT member should only respond within the scope of his or her training, or there may be serious consequences.

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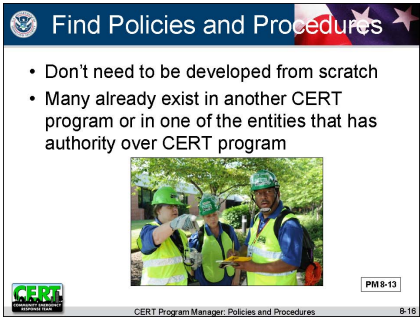
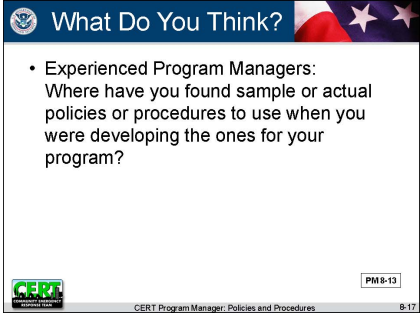
UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Tips for Reducing Liability</p> <ul style="list-style-type: none">• Reducing liability during training, exercises, and activation must be prime concern for Program Manager<ul style="list-style-type: none">– Keep safety at forefront, whatever CERT activity– Become familiar with regulatory requirements for volunteers in your State– Visit CERT Web site page, Reducing Liability <p><small>CERT Program Manager: Policies and Procedures B-14</small></p>	<p>Explain that reducing liability during training, exercises, and activation should be a prime concern for every Program Manager.</p> <p>Offer these tips for Program Managers:</p>
<p>Display Slide 8-14</p>	<ul style="list-style-type: none">▪ Keep safety at the forefront, whatever the CERT activity.▪ Become familiar with the regulatory requirements for volunteers in your State.<ul style="list-style-type: none">• Virtually all States have laws dealing with liability. Program Managers need to conduct some research to ensure that the program is compliant.▪ Visit the CERT Web site page, Reducing Liability www.citizencorps.gov/cert/start-3-1d.shtm<ul style="list-style-type: none">• Review the suggestions for reducing liability during training (instructors, participants, classroom/exercise area, materials).• Review the suggestions for reducing liability during exercises.• Review the suggestions for reducing liability during team exercises.
 <p>More Tips</p> <ul style="list-style-type: none">• See the Sample Hold Harmless/Permission Request form on CERT Web site• Visit Web site of Legal Information Institute, U.S. Code Collection, Limitation on Liability for Volunteers• Visit Web site of Missouri CERT; see page, CERT: Liability issues <p><small>CERT Program Manager: Policies and Procedures B-15</small></p>	<ul style="list-style-type: none">▪ See the Sample Hold Harmless/Permission Request form on the CERT Web site at www.citizencorps.gov/cert/start-3-1.shtm▪ Visit the Web site of the Legal Information Institute, U.S. Code Collection, Limitation on Liability for Volunteers at www4.law.cornell.edu/uscode/html/uscode42/usc_sec_42_00014503----000-.html
<p>Display Slide 8-15</p>	<ul style="list-style-type: none">▪ Visit the Web site of Missouri CERT on its page, CERT: Liability issues. http://sema.dps.mo.gov/CC%20Webs/CCcertliability.asp

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

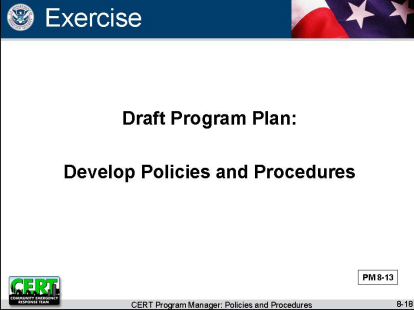
UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
PM, Additional Materials	<p>Refer participants to the paper <i>Citizen Corps/Community Emergency Response Team (CERT) Liability</i> at the end of this unit in the “Additional Materials” section. This paper was compiled by Teresa L. Anderson, then Deputy Director of Brookings County (SD) Emergency Management. It is based extensively on the CERT Web site information.</p> <p>Explain that the information in this document should be seen only as suggestions and ideas on ways to manage liability concerns and in no way is a complete list of ways to manage liability. Not all suggestions and ideas pertain to each program. They should be used for informational purposes only.</p>
Emphasize this point.	<p>Tell participants that, in all cases, the local jurisdiction’s attorney or legal counsel should be consulted about documents such as a liability waiver or hold harmless agreement that the CERT program will use.</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="188 363 269 436">  </div> <div data-bbox="188 583 605 898">  <p>Find Policies and Procedures</p> <ul style="list-style-type: none"> • Don't need to be developed from scratch • Many already exist in another CERT program or in one of the entities that has authority over CERT program <p>CERT CERT Program Manager: Policies and Procedures 8-16</p> </div> <p data-bbox="188 913 462 949">Display Slide 8-16</p> <div data-bbox="188 982 605 1297">  <p>What Do You Think?</p> <ul style="list-style-type: none"> • Experienced Program Managers: Where have you found sample or actual policies or procedures to use when you were developing the ones for your program? <p>CERT CERT Program Manager: Policies and Procedures 8-17</p> </div> <p data-bbox="188 1312 462 1348">Display Slide 8-17</p>	<p data-bbox="630 359 1393 499">Is there anything that experienced Program Managers want to add about addressing risk management and liability concerns, particularly in terms of policies and procedures?</p> <p data-bbox="630 590 1226 625">Where to Find Policies and Procedures</p> <p data-bbox="630 642 1437 783">Explain that, while policies and procedures are essential, they don't need to be developed from scratch. Many already exist in another CERT program or in one of the entities that has authority over the CERT program.</p> <p data-bbox="630 982 1161 1018">Ask experienced Program Managers:</p> <p data-bbox="630 1035 1404 1144">Where have you found sample or actual policies or procedures to use when you were developing the ones for your program?</p> <p data-bbox="630 1377 1334 1486">Encourage Program Managers, both new and experienced, to talk with others in the class about sharing their policies and procedures.</p>




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
 <p>Exercise</p> <p>Draft Program Plan: Develop Policies and Procedures</p> <p>CERT CERT Program Manager: Policies and Procedures</p> <p>PM 8-13</p> <p>B-18</p> <p>Display Slide 8-18</p>	<p>Exercise: Draft Program Plan: Develop Policies and Procedures</p> <p>Purpose: This exercise allows participants to record ideas for developing policies and procedures for their own program.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Ask participants to enter ideas in the eighth section, <i>Policies and Procedures</i>, individually. There are two lists for everyone to complete and a third section for experienced Program Managers.<ol style="list-style-type: none">a. (Experienced Program Managers): Do your policies and procedures need to be revised?b. (Everyone) Things I need to research and people I need to talk to before we develop (revise) policies and proceduresc. (Everyone) Thoughts I had about the policies and procedures we need to develop (e.g., policies/procedures or elements that are specific to our program)

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="240 394 678 724"><p>Unit Summary</p><ul style="list-style-type: none">• Importance of Policies and Procedures• Policies and Procedures for CERT• Resources for Developing Policies and Procedures<p>CERT Program Manager: Policies and Procedures 8-19</p></div> <p data-bbox="240 741 506 772">Display Slide 8-19</p> 	<p data-bbox="708 394 961 436"><i>Unit Summary</i></p> <p data-bbox="708 457 1487 529">Tell participants that this unit has looked at policies and procedures:</p> <ul data-bbox="708 550 1487 688" style="list-style-type: none">▪ Importance of Policies and Procedures▪ Policies and Procedures for CERT▪ Resources for Developing Policies and Procedures <p data-bbox="708 814 1487 886">Do you have any questions about anything covered in this unit?</p> <p data-bbox="708 970 863 1003">Transition</p> <p data-bbox="708 1024 1416 1096">The next unit will discuss how to evaluate a CERT program.</p>

Additional Materials

Two samples of policies/procedures:

- City of Grand Island (NE), CERT Policies and Procedures [all in one document (6 pages)]
- Rowlett (TX) CERT Uniform Policy [single document (4 pages)]

Liability paper:

- Citizen Corps/Community Emergency Response Team (CERT) Liability

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CERT Policies and Procedures

GENERAL POLICIES

Direction & Control

The CERT Steering Board will set all policies and operational procedures. Policy direction of this CERT is influenced by the following documents:

1. All applicable State, County, and City laws with respect to emergency or disaster response and related liability protection,
2. This organization's CERT Bylaws,
3. Policies and procedures of Hall County, City of Grand Island and partnering departments.

These policies and procedures are intended to govern activities before, during and after emergencies and include training, exercises, activities, response, recovery, and meetings.

Duty to Act

As a volunteer, no CERT member has a legal duty to act and is not required to respond to incidents in their immediate area nor to calls for team activation. However, once responded, volunteers must follow safe and effective practices at all times. Volunteers who abandon their posts, act outside their training or responsibility, or otherwise violate policies or codes of conduct are subject to termination.

Insurance & Liability

CERT volunteers are required to maintain their own insurance for health to maintain membership in the organization. Volunteers are not authorized to operate any motor vehicle in carrying out their duties as CERT volunteers (see Restricted Activities).

CERT volunteers are subject to liability legislation adopted by the State of Nebraska. No liability protection exists for negligence or wanton disregard. CERT volunteers are instructed to always remain within their scope of training, assigned responsibilities, and act as any other reasonable person would act in similar circumstances.

CERT Functions (not an all-inclusive list)

- Major Disaster Operations - (within the limits of CERT training)
 - Light Search and Rescue
 - Damage Assessment
 - Light Fire Suppression
 - Logistical support
 - Disaster Medical Operations
 - Communications and Coordination
 - Documentation
 - EOC staffing
- Non Disaster Operations
 - Training
 - Exercises
 - Public education & outreach
 - Assist partner organizations
 - Service and community projects

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Training

The CERT Basic Training Course, as defined by FEMA curriculum, is the foundation of CERT training and the minimum requirement for membership. Additional training made available to CERT members by partner organizations is intended to increase their awareness, knowledge and abilities, but does not authorize members to work outside their role as CERT volunteers. Membership, training or experience in other organizations does not allow the volunteer to work outside the CERT mission as a CERT volunteer.

Public Education & Outreach

CERT volunteers are an effective and informative resource in promoting emergency preparedness and public education information. CERT volunteers are encouraged to participate in events, activities and presentations sponsored by the CERT, Citizen Corps Council or partner organizations.

Equipment

All equipment, identification, and materials issued to the CERT volunteer are the property of the City of Grand Island and must be returned upon request. CERT volunteers are encouraged to supplement their equipment ensemble with items they feel are useful and appropriate. Equipment that is determined to be outside the scope-of-practice of CERT (firearms, chain saws) are not authorized for inclusion in the volunteer's equipment bag.

CERT volunteers are expected to maintain their equipment in proper working order and to bring the equipment to all necessary training sessions, exercises and incidents. Equipment that is lost, stolen or broken is to be reported immediately to the CERT leadership. Remnants of broken equipment should also be returned.

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EMERGENCY RESPONSE POLICIES

Spontaneous Response

The Hall County CERT recognizes that a volunteer may find themselves suddenly involved in an emergency that happens in their home, neighborhood, workplace or immediate area, or they may come upon an emergency in the course of normal activities. In such spontaneous incidents, CERT volunteers:

- should ensure that emergency response authorities have been contacted with accurate information,
- identify themselves as a CERT volunteer to 911 operators and emergency responders when appropriate,
- may render assistance within their current training and abilities,
- shall relinquish command of the scene to proper authorities upon their arrival and may render assistance as requested by incident command.

Inappropriate Self-Deployment

CERT volunteers are prohibited from self-deploying to routine emergencies in which they are not immediately involved nor requested. Such inappropriate self-deployment is a barrier to proper emergency response and may result in immediate suspension and termination.

Activation

CERT volunteers may often be notified before specific response needs are determined. This is to enable local authorities the opportunity to assess the resources available, stage and deploy these resources. The Hall County CERT recognizes three levels of activation to be made by the Emergency Operations Center (EOC):

Level 1 – Advance Notice

This level requires no immediate response action by CERT volunteers. This is an advisory that CERT team leaders have been notified of an emergency management activity which may require CERT assistance. Team leaders will give their members a “heads-up” notice via phone or email and determine the status of all volunteers as “available” or “unavailable”. This information will be forwarded to the EOC contact or notifying official as soon as possible.

Level 2 – Alert / Prepare / Standby

CERT team leaders and volunteers are to prepare for full deployment within 2 to 4 hours and will remain on standby until notified as an assignment. Upon Level 2 or Standby notification, CERT leaders will contact their volunteers via phone or email to advise them of the pending situation and determine their availability and status. Team leaders will report the status of their team members (who are ready to respond) to the appropriate contact or notifying official as soon as possible. Personal equipment and supplies, vehicles and kits of food, water and clothing should be checked, assembled and packed for deployment.

Level 3 – Immediate Deployment

Immediate deployment is authorized for CERT volunteers to proceed without delay to their normal assembly point or other area as designated by the EOC. Team leaders will notify all volunteers on their team to deploy and provide a

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status report of member's availability back to the appropriate contact or notifying official as soon as possible. Once the team is operational and on-scene, the team leader will notify the appropriate contact or notifying official with an updated status and await further instructions.

Team Activation Process and Deployment Protocols

1. Team leaders will be notified by an EOC official to activate their team to Level 1, 2 or 3. If it is not possible for EOC to contact the team leader, the team leader can activate their team in a self deployment mode.
2. Team leader notifies each team member via phone call out tree to meet at their designated meeting location or the incident scene depending on the situation.
3. City and County map coordinates will be used to determine location of emergency scene or incident.
4. Following NIMS training, the first CERT members on scene will select the "on-scene" team leader.
5. Teams do not leave the staging area until adequate resources (personnel and equipment) are assembled.
6. Establish communications with all team members and ICS command post.
7. Always utilize established protocols and checklists during activation.

NIMS and CERT

All CERT activities will follow the principles of the National Incident Management System (NIMS) and the Incident Command System (ICS). CERT volunteers will report to the Incident Commander upon arrival and await assignment. All operations will fall within the established command structure and CERT volunteers will report for demobilization following their assignments.

When working with authorized responders, CERT volunteers will fall into the ICS system as requested by the Incident Commander.

On-Scene CERT Management

If a team is deployed and their "primary" team leader and co-leader are not available on scene, the on scene CERT Responders will elect an "on-scene" leader and co-leader with the following responsibilities:

On-Scene Leader Duties (unless otherwise delegated)

- Conduct response planning activities.
- Act as the single point of contact for all communications and coordination between their team members and the Incident Commander or first responders.
- Size-up situation with assistance from team members and report status to Incident Commander.
- Determine capabilities and limitations of CERT volunteers on scene.
- Organize team and assign tasks to individual team members as they arrive at staging area.
- Align resources and response activities with Incident Commander.
- Establish **Personnel Accountability Reporting (PAR)** system.
- Establish demobilization procedures.
- Conduct post-incident debriefing for their team.
- Establish on-scene radio communications capabilities.
- Check availability of individual member's equipment.

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- Determine location of team equipment and deploy to scene.
- Conduct needs assessment for logistics support.
- Act as team Safety Officer.
- Collect "Accountability Tags" from each team member as they arrive on scene and ensure tags are returned when member leaves the scene.
- Maintain personnel logs (member's time in, assignment and time out of scene) and other resource documentation as required.
- Ensure all members have a "buddy" assigned.
- Resource management of team members – rotate and replace personnel.

Safety

The safety of responders and the general public are of primary importance and all CERT activities must first ensure that additional injuries are avoided. Volunteers shall report all unsafe situations, activities, or practices immediately and take appropriate protective action for themselves and bystanders.

Reporting Injuries and Accidents

Any activated CERT member who suffers or witnesses an injury while performing an assigned task shall immediately report it to the Incident Commander through ICS.

Restricted Activities

Many CERT members have skills beyond what is taught through the CERT program (e.g. medical and health professionals, heavy equipment operators, etc.). While these skills may be helpful during an emergency or disaster, and can be utilized in other programs, they are outside of the CERT scope-of-practice and are not authorized activities as a CERT volunteer.

Other unauthorized activities include:

- Possession or use of a firearm or other weapon
- Operation of any motor vehicle (private or government)
- Inappropriate self-deployment to routine emergencies

Volunteers found working outside of their CERT mission or engaging in restricted activities or otherwise acting contrary to the code of conduct are subject to immediate removal from the incident and termination.

Communications

CERT volunteers are encouraged to utilize effective communications procedures, including the use of FRS handheld radios, for ensuring proper communications between team members and with local responders.

Documentation

CERT team leaders should maintain the following documentation:

- Current team member contact numbers
- Preliminary Damage Assessment Form
- Communication Log & Message Forms
- Personnel Accountability – PAR Logs
- Medical / Triage Log
- ICS Logs and Forms

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Credentialing & Identification

Vests, ID cards and accountability tags are means of readily identifying CERT volunteers. As with all other issued equipment, these credentialing and accountability tags are property of the City of Grand Island. The following policies apply to all current and future credentialing systems used by the CERT.

During Spontaneous Response

Members are encouraged to wear their vest and other identification as a means of ready identification whenever they act as a CERT volunteer, and when such identification is readily available. Wearing the vest and presenting the ID to responders will help ensure responders are aware of your presence on scene.

During Official Activation


- CERT Responders are required to present current ID badges and Accountability Tags to their team leader or incident commander when responding to an incident.
- Official CERT vests shall be worn during all CERT activations/events for ready identification during deployments. Helmets are considered protective equipment and are mandatory, along with other protective apparel, in any disaster scene.

Members may not wear CERT uniform items (vest/helmet) or display CERT identification unless performing in an official capacity (training, events, deployments, etc.).

T-shirts issued to CERT members are not considered official uniform items and may be worn in day to day use. CERT members are encouraged to remember their surroundings and not wear the CERT t-shirt in places that might bring discredit to the CERT organization (see Bylaws-Code of Conduct).

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

ROWLETT CITIZEN CORPS COUNCIL ORGANIZATIONAL POLICY	
TITLE: CERT Uniform Policy	
APPROVAL SIGNATURE: 	DATE: 10/1/2008 POLICY NO.: 08-117 PROGRAM : CERT SECTION: Operations PAGES: 4
NAME: Michael D. Lucas TITLE: CERT Director	

Introduction

The appearance of volunteers reflects upon the organization they represent. The wearing of appropriate uniforms enhances the appearance of volunteers and promotes a positive, professional perception of the organization and its personnel. Rowlett CERT volunteers are encouraged to wear uniforms at all public events involving Rowlett CERT, particularly activations and CERT sponsored events and activities. This policy promulgates expectations and standards concerning uniforms and appearance.

CERT personnel are expected to present a neat, clean and well-groomed appearance when conducting operations or when wearing CERT uniform or branded gear in any public setting. Rowlett CERT volunteers shall observe community standards of decorum appropriate to a public service agency at all times. While volunteers may exercise wide latitude concerning clothing and appearance options, there remains a need for guidelines to maintain a reasonable level of uniformity and conformity to standards of appearance. When deployed, uniformity of appearance helps identify CERT volunteers from other agency volunteers, spontaneous volunteers and onlookers, aiding responding agencies and the general public in determining the status of CERT responders. The appropriate wearing of grade or level insignia aids in identifying leaders and those with advanced training. Appropriate uniforms reinforce the appearance of professionalism, dedication and competence associated with Rowlett CERT.

Uniform Parts

Specific uniforms are not strictly specified by Rowlett CERT; however certain items of clothing, particularly CERT or Rowlett CERT branded clothing are encouraged. CERT branded clothing is available in a variety of colors and styles. When selecting CERT branded clothing, volunteers are encouraged to seek color and style combinations that enhance the image of Rowlett CERT and that present a pleasing appearance. Volunteers are required to observe safety considerations in hazardous operational settings. Non-hazardous operational settings are defined as those settings where an individual is not at risk, or expected to encounter risk of bodily harm during the course of anticipated duties. Anticipated duties include any duty for which CERT volunteers may be assigned during a particular incident. Staffing a booth at a fair or festival is an example of a usually non-hazardous operational setting. A callout for a flood or a search for a missing person is a hazardous operational setting, even if the volunteer is assigned to a relatively safe setting such as the EOC. All volunteers are subject to reassignment to any part of an operational area and are expected to deploy dressed and equipped accordingly.

- **VESTS.** Bright yellow reflective ANSI safety vests are authorized. Volunteers are encouraged to wear vests with the word CERT across the back in reflective lettering. Vests are required attire for hazardous operational settings. Vests should be sized to fit over all outerwear, such as winter coats or foul-weather gear.
- **Helmet.** An approved hard-hat is required for all hazardous operational settings.
- **Grade or Level Insignia.** The display of grade or level insignia is optional. Rowlett CERT volunteers are encouraged to wear the appropriate grade or level insignia anytime the display of the identification card is

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 8: POLICIES AND PROCEDURES

08-117 CERT Uniform Policy

required, or when in uniform. Grade or level insignia shall be worn on the outermost garment. Grade or level insignia may be displayed

- over the heart on the left breast of shirts, outerwear and vests.
- on either or both collars of a polo or an oxford-styled shirt or collared outerwear.
- on the crew-neck of a T-shirt.
- affixed in some way to one's identification badge hanger or neck loop.

NOTE: Affixing the level or grade insignia to the ID badge hanger or neck loop is recommended as a minimum level or grade insignia display, as this will display the insignia anytime the badge is displayed.

- **Ball Caps.** CERT branded ball caps are recommended for deployed operations where helmets are not required, particularly for hot, sunny weather.
- **T-Shirts.** CERT branded green T-shirts are recommended for deployed operations wherever safety permits, particularly for hot weather wear.
- **Polo Shirts.** CERT branded white polo shirts are recommended for non-operational settings, such as meetings.
- **Oxford-Styled Shirts.** CERT branded, CERT green, collared style button shirts are recommended for non-operational settings, such as meetings.
- **Trousers and Shorts.** Black, kaki or Navy blue trousers, jeans or shorts are recommended. The choice of long trousers or short trousers (shorts) shall be governed by the context and situation. Most operational settings will require long trousers. Shorts may be appropriate for meetings or non-hazardous operational settings, such as staffing a booth at a festival.
- **Shoes.** Boots or shoes shall be appropriate to the context and situation. Boots or closed-toe shoes are required for hazardous operational settings. Open-toed shoes or sandals may be appropriate for meetings or non-hazardous operational settings, such as staffing a booth at a festival.
- **Outerwear.** Examples of outerwear include gloves, sweat shirts, wind breakers, coats and foul-weather gear. Outerwear shall be appropriate to the prevailing situation, event or context.

Recommended Uniform

Uniform recommendations are intended to reflect prevailing community standards, and to be consistent with requirements to promote the safety and professional appearance of volunteers representing Rowlett CERT. When considering appropriate apparel, CERT volunteers are expected to be guided by the following paradigm. If, in a given situation, event or context, City of Rowlett fire fighters or police officers might reasonably be expected to appear in a shorts or a t-shirt styled uniform, then CERT volunteers would likely be considered appropriately dressed in the uniform described in the Non-Hazardous Operational Setting: Informal Context section of this policy. CERT volunteers are expected to dress in a manner comparable with City of Rowlett fire fighters and police officers, as appropriate to the specific CERT mission at hand.

If the situation, event or context suggested that City of Rowlett fire fighters or police officers might reasonably be required to appear in more formal uniform attire, then CERT volunteers should follow the Non-Hazardous Operational Setting: Formal Context uniform guidelines listed herein. In situations, events or contexts where City of Rowlett fire fighters or police officers are expected to appear in a tactical uniform, the Hazardous Operational Setting uniform is appropriate for CERT Volunteers.

- **Hazardous Operational Setting.** Full-length jeans or sturdy trousers, such as Battle Dress Uniform (BDU) styled garments are required. T-shirts or oxford-styled shirts are appropriate. Sleeve length (long or short) is dependent upon weather and safety considerations. Boots or closed-toe shoes, vest and helmet are required.
- **Non-Hazardous Operational Setting.**

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- **Formal Context.** Full-length dress jeans or trousers, polo shirts or oxford-styled shirts, dress shoes or dress sandals may be appropriate. A neat, professional, setting-appropriate appearance is expected.
- **Informal Context.** Long trousers or shorts, t-shirts, polo shirts or oxford-styled shirts and casual shoes or sandals may be appropriate. A neat, professional, setting appropriate appearance is expected.

Personalization of Uniforms

Rowlett CERT volunteers are permitted to personalize their uniforms within the boundaries set by this policy. Uniforms must remain in compliance with this policy. Volunteers may adorn their clothing, including uniform items, to reflect individuality and preference as long as the adornments are not offensive to others, do not violate local community standards of decorum, do not reflect inappropriately on the organization or violate applicable federal, state or local laws or rules. Adornments shall be reasonably discrete and not interfere with the intended purpose of the garment.

- **Permitted Expression and Practice**

Examples (but not limited to) of permitted expression or display on uniforms include:

- Nametags, unit numbers or amateur radio call signs displayed as pins, patches or reflective lettering.
- Patches identifying relevant certifications or affiliations such as Red Cross First Aid, SkyWarn, Explorer or Explorer leader, Rowlett Fire Corps, VIPS, or NASAR certifications or designations.
- United States or Texas State flag pins, decals or patches.

- **Prohibited Expression and Practice**

Examples (but not limited to) of prohibited expression include:

- Obscene words, pictures or symbols.
 - Example: If a display would earn a movie a PG, or more restrictive rating, it is probably inappropriate for any display associated with Rowlett CERT.
- Any display or adornment that violates applicable federal, state, local law or rule is prohibited.
 - For example, IRS rules prohibit non-profit 501(c)(3) agencies from promoting a political position, so it is inappropriate for a volunteer to campaign while wearing Rowlett CERT branded gear, or to display political buttons, slogans, candidates' names or other identifying criterion on their gear. Such displays endanger Rowlett CERT's status with the IRS, and with the City of Rowlett.
- Any displays or adornment that may reflect inappropriately on Rowlett CERT, the community or any particular group within the community.
 - Examples include symbols associated with gangs or criminal groups, hate crimes or illegal exclusionary behavior.
- Any adornment or display that interferes with or reduces the effectiveness of the garment for its intended purpose.
 - Examples include a football team flag or logo that obscures the reflective CERT label on the back of an ANSI compliant safety vest. Any flag or other device that interferes with the reflective coating on a CERT vest or helmet.
 - Backpacks and other customary and necessary equipment systems that may interfere with reflective lettering of the ANSI compliant safety vest are excluded from this policy, provided the interference

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with the safety garment is of an expected and routine nature fundamentally inherent in the use of the offending object.

Violations of the Uniform Policy

Violations of the uniform policy shall be evaluated by CERT leadership. Penalties shall be imposed as appropriate. Penalties include sanctions ranging from being asked to secure from an activation or event, to being removed from CERT. The senior on-site CERT official is authorized to impose immediate penalties, up to and including removing a CERT volunteer from the activity or activation event. The CERT Director shall review all penalties imposed and render an appropriate judgment with respect to additional or on-going sanctions. The appeals process through the RCCC Board of Directors remains in effect for volunteers seeking a review of penalties rendered under this policy.



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**Citizen Corps/Community Emergency Response Team (CERT)
Liability
January 2005
Compiled by Teresa L. Anderson, Deputy Director BCEM**

"We are really teaching the volunteers life skills with the exception of maybe search patterns and building damage. The rest of the skills they can use day-to-day in their normal lives. As long as they operate within the scope of the training, liability should not be an issue." Frank Lucier – retired from the San Francisco Fire Department. He developed and was the former Director of the City's innovative and internationally recognized Neighborhood Emergency Response Team system.

Proactive steps to take to manage liability concerns for your program.

1. Determine what type of program will work best for your jurisdiction
 - a. Activate Only
 - b. Self-Activated
 - c. Educational & training opportunity
 - d. A Combination
2. Do your research
3. Reducing Liability (This section is also available at http://training.fema.gov/EMIWeb/CERT/new_CERT/t3-4.htm)
 - a. During training-Instructors
 - b. During training-Students
 - c. During training-Classroom/Exercise Area
 - d. During training-Materials
 - e. During Exercises
 - f. During Team Activation
4. Training/Scope of Training
5. First Responders
6. Review South Dakota Legislation
7. Hazard Mitigation and Span of Control

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1. Determine what type of program will work best for your jurisdiction
 - a. Activate Only-This type of team responds to any type of emergency/disaster when requested from a predetermined governing body. The governing entity of the team would assume liability once they have called and activated their CERT team. If the governing body is a governmental entity, the SDCL 62-1-5.1 (see Attachment A) states all volunteers are automatically covered for governmental entities as long as they are listed in the minutes of their meeting. For example a CERT Roster of Active Team members is approved and read into the County Commissioner's meeting minutes, prior to activation.
 - b. Self-Activated Team-In this type of team, individuals will respond on their own. They are not activated to respond. These responding individuals would assume their own liability and would not qualify under the definition of a covered volunteer. (see a. Activate Only for a covered volunteer) (see Attachment A SDCL 20-9-4.1, Good Samaritan Volunteer)
 - c. Educational & Training Opportunities-Provide education to citizens. Individuals may want to know what to do and what they can do in the event they need to take care of themselves. Citizens may not want to be on an activated team or self activate. Rather they want the information and training. For example, how to put out a kitchen fire, or if their children fall and break their arm, they would then have the basic knowledge and training to know what to do until first responders can arrive.
 - d. Combination-Some jurisdictions have a combination of Activated, Self-Activated, and educational programs. Once again this goes back to what is determined best for each individual jurisdiction. The governing authority would need to determine what authority will be given to the volunteer and realize those who self-activate would be assuming their own liability and work comp coverage.
2. Do your research
 - a. Consult your jurisdiction's legal counsel. They are the 'experts' in this area.
 - i. Consider obtaining a release from liability, a Hold Harmless and/or similar instruments if local legal counsel deems it necessary. Many CERT programs have all students sign this type of agreement before starting training. (See Sample 1 & Sample 2)
 - b. Conduct internet research. Some websites to consider are:
 - i. www.nonprofitrisk.org
 - ii. www.citizen corps.gov/councils
 - iii. http://training.fema.gov/EMIWeb/CERT/new_CERT/index.htm
 - iv. <http://www.eriskcenter.org>
 - v. The Federal Volunteer Protection Act of 1997
<http://www.npaction.org/article/articleprint/420/-1/153/>
 - c. Talk with other program managers to discuss how they addressed the liability issue.
3. Reducing Liability
 - a. During training-Instructors

Steps that you can take with your instructors to help reduce liability include:

 - Establishing training standards and safety requirements for training.
 - Briefing all instructors on their responsibilities to conduct safe and effective training.
 - Ensuring that all instructors are prepared to meet the objectives for their sessions.

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- Providing co-instructors to assist the instructors for all activities.
 - Ensuring that all instructors model appropriate safety behavior, such as safety gear for all demonstrations.
 - NOTE: Be sure that your instructors understand that they can give students permission to opt out of an activity if they have a condition that they may aggravate by participating.
 - Provide a Safety Officer during hands-on training.
- b. During training-Students
Steps that you can take with CERT students to help reduce liability include:
- Ensure that students understand that they may opt out of activities if they have a condition that they may aggravate by participating. (Know their limitations and remember personal safety is always first priority)
 - Require all students to sign a hold harmless agreement.
 - Explain the potential hazards that students may face in class activities, during exercises, and during activation (depending on program type).
 - Provide copies of all CERT safety rules and requirements to each student. Require them to sign one copy and return it to you before class begins. Encourage the students to keep the other copy for their records.
 - Require all students to wear safety gear for all activities.
 - When you see an unsafe act, correct it immediately.
 - If someone is injured during class, document the injury and ensure that the student receives appropriate medical treatment.
 - Emphasize that rescuer safety is the primary concern in training and activation.
- c. During training-Classroom/Exercise Area
Steps that you can take to ensure that the CERT classroom and exercise area are safe include:
- Walk through the classroom and exercise area(s) before each class to identify and correct unsafe conditions.
 - Check all to ensure that it is in good working order.
 - NOTE: This is something that should be done before every class begins.
 - Consider assigning a Safety Officer
- d. During training-Materials
The main step to take to reduce liability related to the CERT materials is to ensure that you have written releases for all copyrighted materials (including photographs and cartoons). (Note that if you are using FEMA's materials without alteration, all necessary copy right releases have been secured.) Remember that photographs and other materials found on the Internet are copyrighted. Also look to the Citizen Corps Council website to obtain permission to use the Citizen Corps Logo, Mark, and/or banners.
- e. During Exercises
Always take the measures below to reduce liability during exercises:
- Conduct a pre-exercise briefing in which you provide the objectives (including safety objectives) for the exercise.

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- Treat all drills, functional exercises, and full-scale exercises as the real thing. Enforce all safety rules strictly.
 - Stress teamwork, safety equipment, and the use of the buddy system.
 - If you see an unsafe act, intervene immediately!
 - Conduct a post-exercise debriefing, and cover safety issues as part of the debriefing.
 - Stress the need to document everything using the forms approved by the jurisdiction.
 - If someone is injured, document the injury, and ensure that the volunteer receives appropriate medical care.
 - Consider assigning a Safety Officer
- f. During Team Activation
Take the measures below to reduce liability during team activation:
- Educate your departments about the CERT program, the level of training provided, and how to access and use CERT members during an emergency or disaster.
 - Require that all team activations are in accordance with established CERT protocols.
 - Require team leaders to verify that all CERT members have the necessary tools and equipment, including safety gear, for the response.
 - Require a good size-up and communication of size-up information to first responders as soon as possible after arrival at the scene.
 - Require complete documentation of team assignments, actions taken, results, and communications with first response agency personnel.
 - Stress that CERT members should respond in accordance with the scope of their training. Being a CERT member does not provide rights or privileges beyond being a CERT volunteer.
 - If a CERT member is injured during activations, ensure that the injury is documented and that the volunteer receives appropriate medical treatment.

For these measures to work as intended, you will need to take action before activation and reinforce the measure during team exercises.

4. Training/Scope of Training-Provide sufficient training for volunteers. This may mean providing additional or supplemental training sessions to ensure all volunteers understand and are able to perform specific tasks involved with CERT training. Depending on how the individual jurisdiction sets up their CERT team, some programs may require additional or supplemental training in order to be considered a CERT member. For example, a jurisdiction may require participants be certified in CPR and keep this current in order to be a member of the CERT team.

Be sure citizens understand the **scope** of their training. Those volunteers should respond in accordance with their training as a CERT member. The scope of the training should be stressed throughout the entire program emphasizing what the volunteers are trained to do and able to do. A CERT volunteer, having completed the CERT training in accordance with the CERT training standards, should not respond outside the scope of this training. In the

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event they do, they would not be responding as a CERT member and thus fall outside the set standards for the individual CERT liability. The key to liability is reinforcing to the volunteers to only respond within the scope of their training.

5. First Responders. Solicit and address liability concerns raised by first responders. It is important to obtain the support of the first responders for this program. Discuss the possible areas where CERT members can be of assistance and support to the First Responders. How can the CERT team be an asset in the event of a disaster or emergency? Jointly engage citizen volunteers and first responders in mock scenarios or table top exercises. This not only helps those volunteers get a better understanding of what is expected, but the first responders also know what the CERT team can and cannot do.
6. Review South Dakota Legislation—See Attachment A
SDCL 20-9-4.1, Good Samaritan Volunteer
SDCL 62-1-5.1, Volunteers serving state or political subdivision without pay—Computing or imputing wage—Certain persons not deemed volunteers
7. Hazard Mitigation and Span of Control
For the CERT training, make sure to do hazard mitigation at the training site. Remove or fix any potential hazards that could injure the participants. Also look at the span of control for your training. Just as in ICS, there should be 1 instructor or safety person for every 7 or less participants. This helps insure safety, participants are learning and understanding the training, and can apply it.

Conclusion

Set training standards. CERT participants must clearly know the scope of their training and when they should apply this training. Consider addressing the need for refreshment of training.

Stress that CERT members should respond in accordance with their training. Being a CERT member does not provide rights or privileges beyond being a CERT volunteer. **Scope of training** is the parameter in which the volunteers should be responding.

Inform CERT members of their rights, protection, and limitations as a volunteer.

A Hold Harmless/permission requests/release forms can reduce your CERT program's liability. Have your participants sign this type of agreement **BEFORE** starting training.

MEMO: The information in this document is only suggestions and ideas on ways to manage liability concerns and in no way is a complete list of ways to manage liability. Not all suggestions and ideas pertain to each program, but should be used for informational purposes.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

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Attachment A

S. D. Codified Law 20-9-4.1, Good Samaritan Volunteer

General immunity from liability for emergency care—Exceptions.

No peace officer, conservation officer, member of any fire department, police department and their first aid, rescue or emergency squad, or any citizen acting as such a volunteer, or any other person liable for any civil damages as a result of their acts of commission or omission arising out of and in the course of their rendering in good faith, any emergency care and services during an emergency which is in their judgment indicated and necessary at the time. Such relief from liability for civil damages shall extend to the operation of any motor vehicle in connection with any such care or services.

Nothing in this section grants any such relief to any person causing any damage by his willful, wanton or reckless act of commission or omission.

Source: SL 1968, ch 193; SL 1970, ch 140; SL 1986, ch 4, § 9.

S. D. Codified Law 62-1-5.1. Volunteers serving state or political subdivision without pay--Computing or imputing wage--Certain persons not deemed volunteers.

Volunteers serving state or political subdivision without pay--Computing or imputing wage--Certain persons not deemed volunteers. Any volunteer worker rendering services in or for any agency, department, institution, or instrumentality of the state or of any of its political subdivisions, including counties, townships, school districts, or municipalities, whose services have been duly recommended to the officer or governing body responsible for employment of personnel for the respective entity and duly appointed thereto by such officers or governing body, shall for purposes of this title be deemed an employee of the state or the political subdivision, as the case may be. The appointment shall be entered into the official records or minutes of the entity.

In the event of injury or death, for the purposes of computing compensation for volunteer workers other than volunteer firefighters, a volunteer uncompensated worker's employment earnings from all sources during the last six months of employment shall be used. In the event the volunteer uncompensated worker has never been employed, the worker shall be considered to be earning the state minimum wage over a forty-hour week. The worker's average weekly wage shall be calculated by one of the methods in §§ 62-4-25 to 62-4-27, inclusive. In no event may payments to volunteer uncompensated workers exceed the maximum limitations for benefits as set out in this title. No local prisoner, state inmate, or federal inmate providing services to the state or any of its political subdivisions may be considered a volunteer worker under this section.

Source: SL 1971, ch 278, § 1; SL 2001, ch 292, § 1.

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UNIT 8: POLICIES AND PROCEDURES

Sample 1

**[COMMUNITY NAME]
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM
HOLD HARMLESS/PERMISSION REQUEST**

I, _____, hereby request permission to participate in the _____ Community Emergency Response Team (CERT) program. I understand that this training will involve active physical participation, which includes a potential risk of personal injury and/or personal property damage. I make this request with full knowledge of the possibility of personal injury and/or personal property damage. Further, I have read and understand the program outline that describes all class sections and the associated activities.

I agree to hold The American Red Cross, the _____, _____ Fire Department, [COMMUNITY NAME] and [COMMUNITY NAME] Emergency Management, and their agents and personnel, harmless from any and all claims, actions, suits, and/or injury that I may suffer and which may arise as a result of my participation in the above mentioned class.

I agree to follow the rules established by the instructors, and to exercise reasonable care while participating in the CERT program. I understand that if I fail to follow the instructor's rules and regulations or if I fail to exercise reasonable care, I can be administratively removed from the program.

By executing this release I certify that I have read this release in its entirety, understand all of its terms and have had any questions regarding the release or its effect satisfactory answered. I sign this release freely and voluntarily.

Signature

Date

Emergency Contact Name

Emergency Contact Number

Comments:

Signature of Instructor

Date

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

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Sample 2

Brookings County Community Emergency Response Team/Training Program (CERT)

Release

By signing this Release, I acknowledge that I have read and understand the risks associated with this activity. (**Warning:** Individuals who do not wish to accept the risks described in this document, should not sign it). The undersigned participant in the Community Emergency Response Team/Training Program acknowledges and agrees as follows:

Acknowledgment of Risk

Participation in the Community Emergency Response Team/Training (CERT) Program involves physical labor and carries a risk of personal injury. I recognize that there are natural and manmade hazards, environmental conditions, diseases, and other risks, which in combinations with my actions can cause injury to me. I recognize that activities associated with this program may include transportation to and from volunteer sites, extinguishing small fires, providing disaster medical care (e.g., controlling bleeding, treating shock, treating sprains and fractures, opening airways, transporting patients), performing light search and rescue activities and other similar activities.

Physical Activity

I understand that the physical activity involved in this program may cause physical and emotional discomfort. I am free from any known heart disease or other serious health problems that could prevent me from participating in any of the activities associated with this program. I am sufficiently physically fit to participate in the activities of the program.

Immunity

I recognize that the activities associated with this program fall within the general immunity from liability for emergency care pursuant to SDCL 20-9-4.1. I certify that I have medical insurance to cover the cost of any emergency or other medical care that I may receive for an illness or injury. If I do not have medical insurance, I will be personally responsible for the cost of any emergency or other medical care that I receive.

Release and Indemnification

I hereby assume all risk of injury or liability and waive any right of recovery from, or to bring suit against Brookings County and any other public or private entity involved with the Community Emergency Response Team/Training, together with all of their employees or agents, for any bodily injury, death, or other consequences arising out of my participation in this activity. I agree to indemnify, defend, and hold harmless the above listed entities and their agents or employees from all loss, costs, damage, injury, liability, claims, and causes of action whatsoever, arising out of or related to any act, error, or omission while participating in any aspect of this activity.

I HAVE READ THE ABOVE RELEASE AND CONSENT TO ITS PROVISIONS.

Signature of Participant

Date

Printed Name

Witness

Date

Created on 1/26/2005

8

UNIT 9: PROGRAM EVALUATION

In this unit you will learn about:

- **Importance of Evaluating a CERT Program.** What program evaluation is and what it can accomplish.
- **What to Evaluate in a CERT Program and How.** Four steps for conducting a program evaluation.
- **Creating a Program Report.** How to create a brief and focused Program Report and the importance of the Program Report in the evaluation process.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

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

- Develop a process for evaluating a local CERT program.
 - Explain what program evaluation is.
 - Describe the purpose of evaluating a program.
 - List the steps for evaluating various program components.
 - Identify the characteristics of a Program Report.

SCOPE

The topics that will be discussed in this unit are:

- Unit Overview
- What Program Evaluation Is
- Why Do Program Evaluation
- How to Do Program Evaluation
- Program Report
- Unit Summary

**ESTIMATED
COMPLETION
TIME**

1 hour

**TRAINING
METHODS**

The instructor begins by conducting a discussion about what a program evaluation is and recaps the conversation by providing the three questions that are asked and answered during a CERT program evaluation.

Next, the instructor reviews the reasons why it is important for CERT Program Managers to do program evaluation.

In the third part of the unit the instructor presents the four steps for conducting a program evaluation.

1. First, decide what you want to learn.
2. Next, figure out a strategy for collecting the information.
3. Then collect the information.
4. Finally, analyze the information you collect and decide on the next steps.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

TRAINING METHODS (CONTINUED) The instructor and class use a sample objective to explore how to develop a strategy for collecting information.
The unit concludes by discussing the characteristics of a good Program Report.

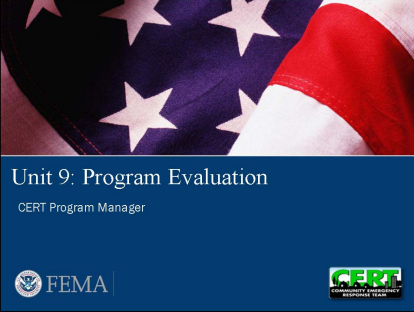
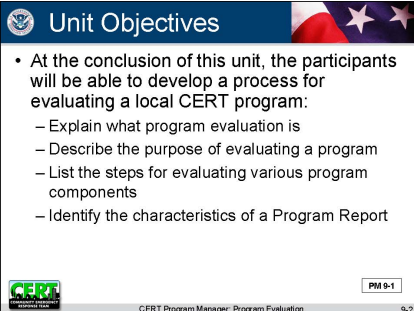
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- RESOURCES REQUIRED**
- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
 - *Community Emergency Response Team Program Manager Participant Manual* (for participants)
 - PowerPoint slides 9-1 to 9-18

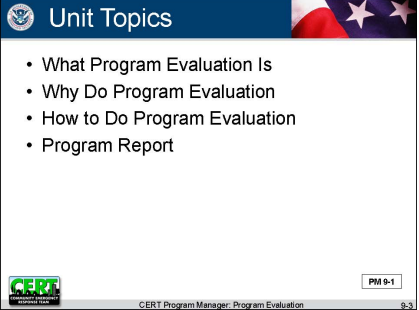
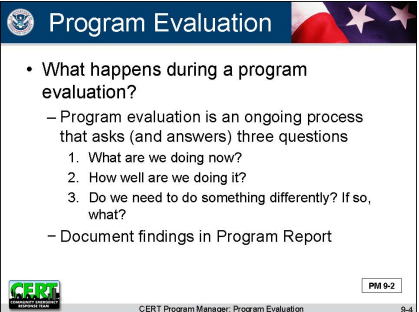
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- EQUIPMENT** The following equipment is required for this unit:
- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers

NOTES A suggested time plan for this unit is as follows:

Unit Overview1 minute
What Program Evaluation Is4 minutes
Why Do Program Evaluation4 minutes
How to Do Program Evaluation40 minutes
Program Report..... 10 minutes
Unit Summary.....1 minute
Total Time: 1 hour








Unit 9: Program Evaluation


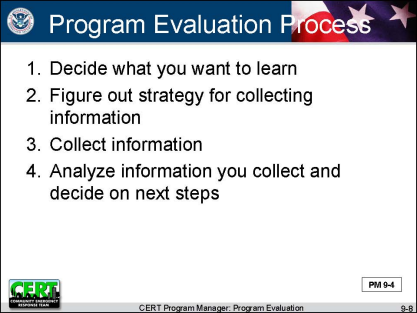
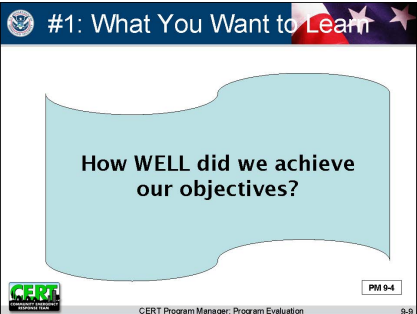
INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 9-1</p>  <p>Display Slide 9-2</p>	<p>Unit Overview</p> <p>Say that a CERT program must have a process for how it is evaluated and measured for effectiveness. Evaluation is the process by which the Program Manager is able to identify appropriate changes and continuous improvements that will keep the CERT program fully functional. This unit looks at:</p> <ul style="list-style-type: none"> • The importance of evaluating a CERT program • What to evaluate in a CERT program and how • The steps for conducting a program evaluation • Creating a Program Report <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to develop a process for evaluating a local CERT program:</p> <ul style="list-style-type: none"> ▪ Explain what program evaluation is. ▪ Describe the purpose of evaluating a program. ▪ List the steps for evaluating various program components. ▪ Identify the characteristics of a Program Report.

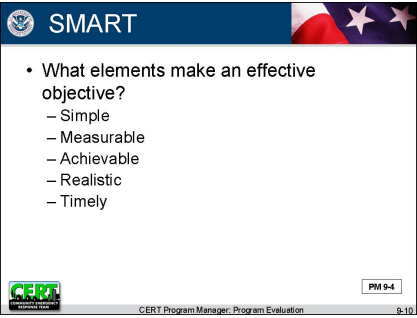
INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none"> • What Program Evaluation Is • Why Do Program Evaluation • How to Do Program Evaluation • Program Report <p>Display Slide 9-3</p>	<p>Unit Topics</p> <p>Say that, to meet the objectives, this unit will look at the following topics:</p> <ul style="list-style-type: none"> ▪ What Program Evaluation Is ▪ Why Do Program Evaluation ▪ How to Do Program Evaluation ▪ Program Report
 <p>Program Evaluation</p> <ul style="list-style-type: none"> • What happens during a program evaluation? <ul style="list-style-type: none"> – Program evaluation is an ongoing process that asks (and answers) three questions <ol style="list-style-type: none"> 1. What are we doing now? 2. How well are we doing it? 3. Do we need to do something differently? If so, what? – Document findings in Program Report <p>Display Slide 9-4</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question. Record responses on an easel pad.</p> <p>The second click displays the responses.</p>	<p><i>What Program Evaluation Is</i></p> <p>Tell participants that the first step is to agree on what program evaluation is.</p> <p>Ask:</p> <p>What happens during a program evaluation?</p> <p>Summarize the discussion by saying program evaluation is an ongoing process that asks (and gets answers to) three questions:</p> <ol style="list-style-type: none"> 1. What are we doing now? 2. How well are we doing it? 3. Do we need to do something differently? If so, what? <p>The results are documented in a Program Report.</p> <p>Evaluation never stops. The implementation of a CERT program is the beginning step for a Program Manager. Evaluation of the program is a continuous process.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

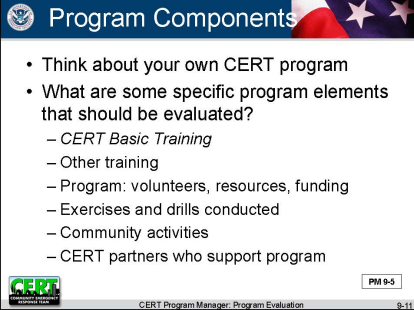

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 394"> Goals and Objectives - Unit 2</p> <ul data-bbox="212 415 581 590" style="list-style-type: none">• Objectives specify activities to accomplish goal• During program evaluation Program Manager needs to find out:<ul data-bbox="233 506 456 590" style="list-style-type: none">– How well program is meeting objectives– What corrections, if any, are needed  <p data-bbox="191 632 602 667"> CERT Program Manager: Program Evaluation 9-5</p> <p data-bbox="191 684 444 720">Display Slide 9-5</p> <p data-bbox="191 806 586 911">Before moving on, ask the participants if they have any questions.</p>	<p data-bbox="634 359 1386 428">Remind participants of the discussion of setting goals and objectives in Unit 2.</p> <ul data-bbox="634 449 1438 716" style="list-style-type: none">▪ Those objectives specified what activities the CERT program would undertake in order to accomplish the goal it had set.▪ During a program evaluation the Program Manager needs to find out how well the program is meeting the objectives – how well it is performing – and what corrections, if any, are needed.
<p data-bbox="191 947 602 982"> Why? Evaluate Performance</p> <ul data-bbox="212 1003 581 1163" style="list-style-type: none">• Evaluation ensures consistency in day-to-day operational activities• By asking “How well are we doing?” the Program Manager:<ul data-bbox="233 1100 581 1163" style="list-style-type: none">– Scrutinizes program’s accomplishments– Verifies that accomplishments meet standards program has set <p data-bbox="191 1220 602 1255"> CERT Program Manager: Program Evaluation 9-6</p> <p data-bbox="191 1272 444 1308">Display Slide 9-6</p>	<p data-bbox="634 961 1133 1003"><i>Why Do Program Evaluation</i></p> <p data-bbox="634 1024 1435 1241">Say that one of the reasons that program evaluation is done is to ensure consistency in day-to-day operational activities. By asking “How well are we doing?” the Program Manager is scrutinizing the program’s accomplishments and verifying that they are meeting the standards the program has set.</p>
<p data-bbox="191 1325 602 1360"> Why? Maintain Program Control</p> <ul data-bbox="212 1381 581 1583" style="list-style-type: none">• Evaluation reassures State and local officials that volunteers are well trained and supervised<ul data-bbox="233 1451 532 1514" style="list-style-type: none">– Evaluation reduces and manages the instances of independent or undirected volunteer actions• By asking “Do we need to do something differently?” the Program Manager is able to make adjustments as needed <p data-bbox="191 1598 602 1633"> CERT Program Manager: Program Evaluation 9-7</p> <p data-bbox="191 1650 444 1686">Display Slide 9-7</p>	<p data-bbox="634 1325 1442 1507">Say that another equally important reason for program evaluation is to allay any concerns on the part of State or local officials that volunteers who have been trained in the CERT program are acting without direction or outside the guidelines of the program.</p> <p data-bbox="634 1528 1430 1633">Remind participants that it takes only a few problem incidents to damage the credibility of the CERT program and raise concerns about training volunteers.</p> <p data-bbox="634 1654 1425 1829">Explain that periodic program evaluation maintains program control and allows a Program Manager to reduce and manage the instances of independent or undirected volunteer actions. It also allows the program to make adjustments as needed.</p>

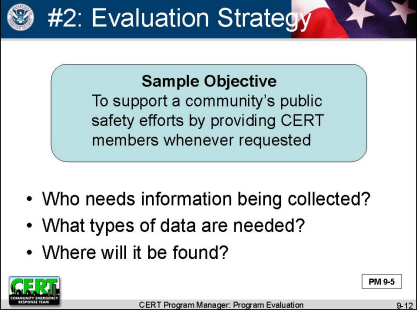
INSTRUCTOR GUIDANCE	CONTENT
	<p>Before moving on to talk about how and what to evaluate, is there anything that experienced Program Managers want to add about the importance of program evaluation?</p>
 <p>Display Slide 9-8</p>  <p>Display Slide 9-9</p>	<p>How to Do Program Evaluation</p> <p>Say that now participants understand what program evaluation is and why it is done. The next step is to review how to do it.</p> <p>Explain that the process for doing program evaluation is not complicated.</p> <ol style="list-style-type: none"> 1. First, decide what you want to learn. 2. Next, figure out a strategy for collecting the information. 3. Then collect the information. 4. Finally, analyze the information you collect and decide on the next steps. <p>Step 1: What Do You Want to Learn</p> <p>Begin by saying that, since the CERT program is strongly dependent upon the ability of the Program Manager to set clear and defined program goals and objectives, the CERT program is most logically evaluated by determining the achievement of those objectives.</p>

INSTRUCTOR GUIDANCE	CONTENT
<p>Quickly review the five parts of an effective objective.</p>  <p>Display Slide 9-10</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question. Record responses on an easel pad.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<p>Ask:</p> <p>What elements make an effective objective?</p> <p>Summarize the discussion by reviewing SMART – acronym that describes an effective objective:</p> <ul style="list-style-type: none"> ▪ Simple ▪ Measurable ▪ Achievable ▪ Realistic ▪ Timely <p>Explain that, during a program evaluation, the Program Manager is trying to find out if the program met the “achievable” part. Did we do what we set out to do?</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 667">The slide titled "Program Components" lists several elements for evaluation: CERT Basic Training, other training, program resources (volunteers, funding), exercises and drills, community activities, and CERT partners. It includes a CERT logo and a slide number "9-11".</p> <p data-bbox="191 684 459 720">Display Slide 9-11</p> <p data-bbox="191 737 581 842">This slide is animated. The first click displays the question.</p> <p data-bbox="191 863 581 1003">Conduct a class discussion by asking this question. Record responses on an easel pad.</p> <p data-bbox="191 1024 605 1094">The second click displays the responses.</p> <p data-bbox="191 1115 589 1220">Before moving on, ask the participants if they have any questions.</p> <p data-bbox="358 1255 440 1331"></p> <p data-bbox="191 1350 540 1455">Address these questions before continuing to the exercise.</p>	<p data-bbox="634 373 699 409">Ask:</p> <p data-bbox="634 443 1360 548">Think about your own CERT program. What are some specific program elements that should be evaluated?</p> <p data-bbox="634 583 1409 688">Summarize the discussion by giving these examples of important elements of a CERT program that should be evaluated:</p> <ul data-bbox="634 709 1344 1010" style="list-style-type: none">▪ <i>CERT Basic Training</i>▪ Other training▪ Program: volunteers, resources, funding▪ Exercises and drills conducted▪ Community activities▪ CERT partners developed for program support <p data-bbox="634 1255 1430 1325">Ask if there are any questions about the elements of a CERT program that should be evaluated.</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 9-12</p> <p>Walk through the process with participants using the sample objective on the slide as an example of what you want to learn. Did we meet this objective?</p> <p>“To support a community’s public safety efforts by providing CERT members whenever requested”</p>	<p>Step 2: Develop a Strategy for Collecting the Information</p> <p>Tell participants that, now that they have decided what they need to learn, the next step is to develop a strategy for collecting the information. The strategy should include answers to these questions:</p> <ul style="list-style-type: none"> ▪ Who needs the information being collected? ▪ What types of data are needed? ▪ Where will the data be found? <p><u>Who needs the information being collected?</u></p> <p>Remind Program Managers that every program has partners and stakeholders who will want to know how the program is doing.</p> <p>For this objective, the information being collected could be provided to:</p> <ul style="list-style-type: none"> ▪ Sponsoring agency ▪ Volunteers ▪ General public <p><u>What types of data are needed?</u></p> <p>Explain that program evaluation data will fall into one of two categories of data: quantitative or qualitative. The kind of data that a program will need for its evaluation strategy is determined by what the program is trying to learn.</p> <p>Explain that qualitative data include commentary, anecdotes, testimonials, observations, etc.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

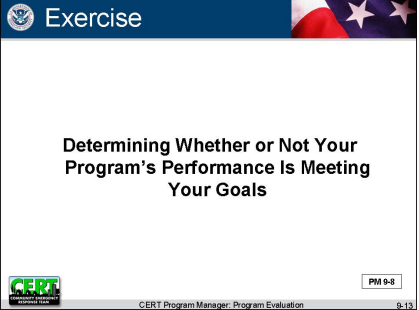
INSTRUCTOR GUIDANCE	CONTENT
PM, P. 9-7	<p>Explain that quantitative data are everything else, for example:</p> <ul style="list-style-type: none">▪ Numbers▪ Ratings▪ Rankings▪ Yes or no responses to specific questions <p>For this objective, quantitative data are the numbers of requests and the number of requests and degree to which the CERT program responded.</p> <p>For this objective, qualitative data might be anecdotes about the experience, e.g., what it meant to a senior citizen to have a smoke detector installed.</p> <p><u>Where will the data be found?</u></p> <p>Remind participants that in Unit 6 there was a discussion about the importance of keeping good records. Here is one of the places where good recordkeeping makes a difference.</p> <p>For this objective, the numbers (the quantitative data) will be found in your records. For qualitative data, Program Managers should debrief with volunteers after public safety events and should jot down observations and any good anecdotes.</p> <p>Refer participants to the <i>Planning for an Evaluation</i> checklist in the Participant Manual and on the next page in the Instructor Guide.</p> <p>Explain that the checklist has questions that will help a Program Manager develop a strategy for an evaluation.</p>

PM, P. 9-7	Planning for an Evaluation
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1. What is the purpose(s) of performing the evaluation, i.e., what do you want to be able to decide as a result of the evaluation? For example:
 - a. What is the status of the CERT program's progress toward achieving its stated goals?
 - b. Do CERT members have adequate resources (equipment, facilities, training, etc.) to achieve the program goals?
 - c. Should priorities be changed to put more focus on achieving the goals? *(Note: This question could be considered as a program management decision rather than an evaluation question.)*
 - d. How should goals be changed, or should any goals be added or removed? Why?
2. Who are the stakeholders that should receive information from the evaluation, e.g., emergency services personnel, community support partners, CERT volunteers, etc.?
3. What information is necessary to really understand the strengths and weaknesses of the program, benefits to the community (outcomes), how the program succeeded or failed and why, etc.?
4. Where (sources) should the information be collected, e.g., program documentation, CERT volunteers, community partners, etc.?
5. What are the best methods available for collecting the information e.g., questionnaires, examining documentation, observing CERTs, etc.?

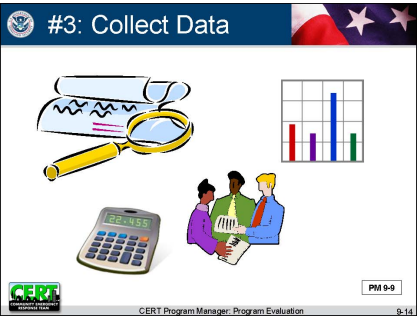
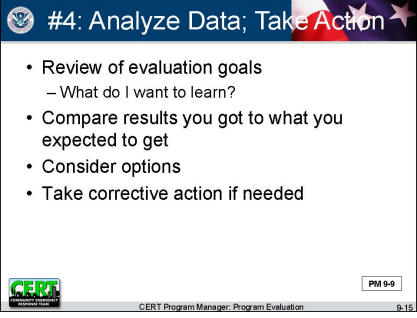
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 9-13</p>	<p>Exercise: Determining Whether or Not Your Program's Performance Is Meeting Your Goals</p> <p>Purpose: This exercise allows participants to develop specific methods for evaluating different CERT program components based on their actual program goals/objectives.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <p><u>Part 1:</u></p> <ol style="list-style-type: none">1. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide.2. Have each person review his/her overall program goal and 1- 2 specific objectives that were developed previously (in <u>Section 1. Program Goals</u>).3. If needed, allow 5 minutes for individuals to develop an objective. Objectives must be SMART: simple, measureable, achievable, realistic, and timely. <p><u>Part 2:</u></p> <ol style="list-style-type: none">4. Divide participants into small groups (e.g., table groups, groups of 3 – 4 participants).5. Tell groups that they will have 20 minutes for each person to:<ol style="list-style-type: none">a. Select one program objective.b. Get ideas from the group on how this objective could be evaluated by the Program Manager (data to collect, questions to ask).c. Write the ideas in their Draft Program Plan. <p>(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
<p>There may not be time for all participants to share their individual findings. You may modify the instructions to limit the report outs to one finding per table.</p>  <p>Display Slide 9-14</p>  <p>Display Slide 9-15</p> <p>Example: Return to the sample objective:</p> <p>“To support a community’s public safety efforts by providing CERT members whenever requested”</p>	<ol style="list-style-type: none">6. Allow 15 minutes to conclude the exercise. Have each table group report out on their findings. Use each group’s findings to generate whole-group discussion about the effectiveness of the goal-based evaluation strategies that are developed.7. Ask participants if there are any questions about the exercise prior to proceeding to the next topic. <p>Step 3: Collect the Information</p> <p>This step is self-explanatory.</p> <p>Step 4: Analyze the Information and Decide on Next Steps</p> <p><u>Analyze data</u></p> <p>Say that, when you analyze data, always begin with a review of your evaluation goals: the reason for the program evaluation. This will help you organize your data and focus your results, analysis, and conclusions.</p> <p>For example, if you wanted to improve your program by identifying its strengths and weaknesses, you can organize data into program strengths, program weaknesses, and suggestions to improve the program.</p> <p>Tell participants to compare the results you got to what you expected to get.</p>

INSTRUCTOR GUIDANCE	CONTENT
<div data-bbox="355 999 436 1073" data-label="Image"> </div> <div data-bbox="188 1150 602 1461" data-label="Image"> </div> <p data-bbox="185 1478 462 1514">Display Slide 9-16</p>	<p data-bbox="630 359 873 394"><u>Consider options</u></p> <p data-bbox="630 411 1325 480">Explain that the second step in taking action is to consider:</p> <ul data-bbox="630 499 1433 747" style="list-style-type: none"> ▪ Conclusions that can be drawn about program operations or meeting goals ▪ Specific recommendations that may help improve the program ▪ What choices there are in implementing those recommendations <p data-bbox="630 766 1084 802"><u>Take corrective action if needed</u></p> <p data-bbox="630 819 1427 963">Say that, if the findings indicate that changes are needed, develop a plan for implementing the changes. The plan should include new objectives (see Unit 2) and may involve new policies and procedures (see Unit 8).</p> <p data-bbox="630 997 1343 1066">What other things would experienced Program Managers add about taking corrective action?</p> <p data-bbox="630 1152 920 1194"><i>Program Report</i></p> <p data-bbox="630 1228 1115 1268">Reporting Evaluation Results</p> <p data-bbox="630 1283 1404 1428">Say that the Program Manager is responsible for ensuring that program evaluation results are properly documented and distributed. This is accomplished via the use of a Program Report.</p> <p data-bbox="630 1444 1414 1518">Point out some things to keep in mind when generating the Program Report:</p> <ul data-bbox="630 1535 1443 1730" style="list-style-type: none"> ▪ Justify your conclusions or recommendations using your program evaluation data findings. ▪ Translate recommendations into specific action plans, including who, what, when, how, and any other “need-to-know” specifics. <p data-bbox="630 1747 794 1782">(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="358 716 435 789"></p> <p data-bbox="191 821 605 1129"></p> <p data-bbox="191 1150 461 1182">Display Slide 9-17</p> <p data-bbox="191 1570 354 1602">PM, P. 9-11</p>	<ul data-bbox="634 359 1401 678" style="list-style-type: none">▪ The level and scope of content depend on the recipient of the report, e.g., funding agency, community supporters, State office.▪ Be mindful of the intended audiences for any Program Report. Every Program Report needs to address the specific interests of the audience while still maintaining its objectivity.▪ Keep the Program Report as concise as possible. <p data-bbox="634 716 1414 783">What other things would experienced Program Managers add about the Program Report contents?</p> <p data-bbox="634 842 1247 873">Exercise: Creating a Program Report</p> <p data-bbox="634 894 1433 999">Purpose: This exercise allows participants to practice appropriate ways to distribute program evaluation results to various audiences.</p> <p data-bbox="634 1125 1377 1192">Instructions: Follow the steps below to conduct the exercise.</p> <ol data-bbox="634 1213 1414 1671" style="list-style-type: none">1. Divide the class into four small groups.2. Assign a different target audience to each small group:<ol data-bbox="691 1356 1109 1545" style="list-style-type: none">a. Sponsoring agencyb. CERT volunteersc. Local Emergency Managerd. General public3. Refer participants to the <i>Creating a Program Report</i> in the Participant Manual and on page 9-17 in the Instructor Guide. <p data-bbox="634 1724 808 1755">(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
<p>As the small groups report out, post the ideas for everyone's benefit.</p>	<p>4. Review the instructions.</p> <ul style="list-style-type: none">a. Scenario: You have had a successful year. You want to tell your assigned target audience about the <i>CERT Basic Training</i> you provided.b. Answer the questions for your assigned target audience.c. You have 10 minutes.d. You will report your plan to the whole group. <p>Debrief: Compliment the small groups on their work. Point out the different strategies that are offered. Remind participants that every communication is an opportunity to promote the program.</p>

PM, P. 9-11	Creating a Program Report
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Scenario: Your program has had a successful year. You want to tell _____ (your assigned target audience) about the *CERT Basic Training* you provided.

1. What do you want or need to accomplish with this report?

Answer: Depending on the audience, the goal will be one or all of these: to inform, to impress, or to justify.

2. How much detail do you need to include? Give examples.




Answer: The amount of detail will vary depending on the goal.

3. How could or should the report be formatted? Why?

Answer: The format will vary depending on the audience and the goal. For example, the report to the sponsoring agency should be fairly formal. The report to the volunteers can be in a newsletter. The report to the Emergency Manager should be straightforward. The information to the general public should be short and clear and should include graphics and human interest stories.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 9: PROGRAM EVALUATION

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 401"> Unit Summary</p> <ul data-bbox="212 415 574 533" style="list-style-type: none">• The importance of evaluating a CERT program• What to evaluate in a CERT program and how to do it• Creating a Program Report <p data-bbox="191 632 602 667"> CERT Program Manager: Program Evaluation PM 9-12 9-18</p> <p data-bbox="191 684 461 720">Display Slide 9-18</p> <p data-bbox="358 758 440 831"></p>	<p data-bbox="634 359 889 401">Unit Summary</p> <p data-bbox="634 415 1365 485">Tell participants that this unit has looked at program evaluation:</p> <ul data-bbox="634 506 1442 653" style="list-style-type: none">• The importance of evaluating a CERT program• What to evaluate in a CERT program and how to do it• Creating a Program Report <p data-bbox="634 751 1414 821">Do you have any questions about anything covered in this unit?</p> <p data-bbox="634 909 789 942">Transition</p> <p data-bbox="634 961 1419 1031">The next unit will discuss how to keep a CERT program going.</p>

UNIT 10: KEEPING YOUR PROGRAM GOING

In this unit you will learn about:

- **Essential Skills and Abilities.** CERT Program Managers' strengths, what more they need to learn, what they need to do themselves, and what they can delegate.
- **Keeping a CERT Program Alive.** The five critical elements required to keep the CERT program healthy and viable.
- **Program Maintenance Matrix.** Technique to identify activities that contribute most significantly to program maintenance.

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

**LEARNING
OBJECTIVES/
PERFORMANCE
OUTCOMES**

- At the conclusion of this unit, the participants will be able to:
- Describe how to sustain a local CERT program.
 - Describe the knowledge, skills, and abilities a Program Manager must possess in order to coordinate a program.
 - Identify elements necessary for sustaining a program.
 - Explain a technique for identifying program activities that contribute most significantly to program maintenance.

SCOPE

- The topics that will be discussed in this unit are:
- Unit Overview
 - Essential Skills and Abilities
 - Keeping a Program Alive
 - Unit Summary

**ESTIMATED
COMPLETION
TIME**

1 hour

**TRAINING
METHODS**

The instructor begins the unit discussion by eliciting the essential skills and abilities the Program Manager should possess (or strive to develop in himself/herself) in order to coordinate and maintain the CERT program.

Next, the instructor explains the five critical elements that CERT Program Managers should focus on to keep their program healthy and viable for the long term.

Last, experienced Program Managers are given the opportunity to work together to develop a program maintenance matrix with key tips and techniques that are required to support each of the critical elements, and thereby maintain their programs.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

- RESOURCES REQUIRED**
- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
 - *Community Emergency Response Team Program Manager Participant Manual* (for participants)
 - PowerPoint slides 10-1 to 10-19

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- EQUIPMENT**
- The following equipment is required for this unit:
- A computer with PowerPoint software
 - A computer projector and screen
 - Easel pad and easel or whiteboard
 - Markers

PREPARATION

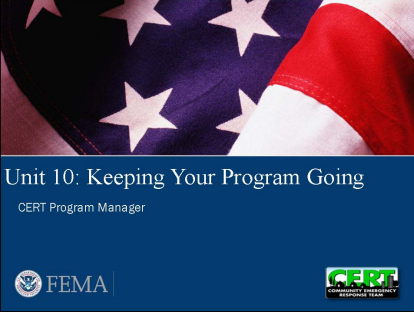
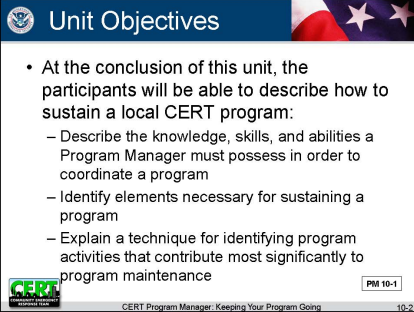
Prepare an easel pad page in advance to use for the Program Maintenance Matrix exercise. Write each of the five critical elements of program maintenance across the top of an easel page (or whiteboard).

NOTES

A suggested time plan for this unit is as follows:

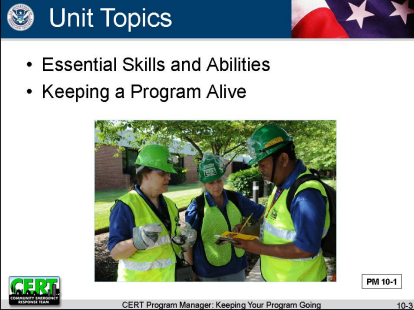

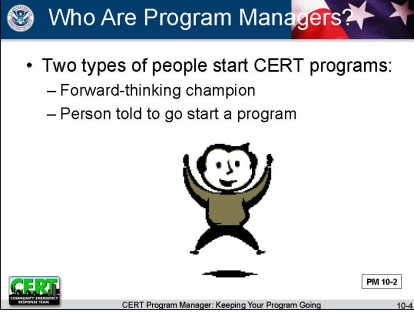

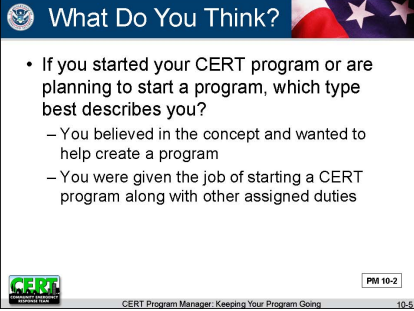

Unit Overview2 minutes
Essential Skills and Abilities27 minutes
Draft Program Plan: My Development Goals.....5 minutes
Keeping a Program Alive25 minutes
Unit Summary.....1 minute
Total Time: 1 hour

Unit 10: Keeping Your Program Going

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 10-1</p>  <p>Display Slide 10-2</p>	<p>Unit Overview</p> <p>Say that a sustainable CERT program must have a strong Program Manager who is competent and able to consider both the short- and long-term program coordination requirements. This unit looks at:</p> <ul style="list-style-type: none"> • Essential skills and abilities the Program Manager should possess • Critical elements involved in keeping a program alive • Use of a program maintenance matrix to identify activities that contribute most significantly to program maintenance <p>Unit Objectives</p> <p>Give the unit’s learning objectives.</p> <p>At the conclusion of this unit, the participants will be able to describe how to sustain a local CERT program:</p> <ul style="list-style-type: none"> ▪ Describe the knowledge, skills, and abilities a Program Manager must possess in order to coordinate a program. ▪ Identify elements necessary for sustaining a program. ▪ Explain a technique for identifying program activities that contribute most significantly to program maintenance.

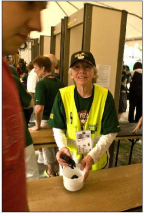
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
 <p>Unit Topics</p> <ul style="list-style-type: none">• Essential Skills and Abilities• Keeping a Program Alive  <p>CERT Program Manager: Keeping Your Program Going 10-3</p> <p>Display Slide 10-3</p>	<h3>Unit Topics</h3> <p>Say that, to meet the objectives, this unit will look at the following topics:</p> <ul style="list-style-type: none">▪ Essential Skills and Abilities▪ Keeping a Program Alive
 <p>Who Are Program Managers?</p> <ul style="list-style-type: none">• Two types of people start CERT programs:<ul style="list-style-type: none">– Forward-thinking champion– Person told to go start a program  <p>CERT Program Manager: Keeping Your Program Going 10-4</p> <p>Display Slide 10-4</p>	<h3>Essential Skills and Abilities</h3> <h4>Who Are Program Managers?</h4> <p>Tell participants that there are two types of people who start a CERT program:</p> <ul style="list-style-type: none">▪ Forward-thinking champions▪ The person who is told to go start a program <p>Say that both may end up being champions, although they get into the job differently.</p>
 <p>What Do You Think?</p> <ul style="list-style-type: none">• If you started your CERT program or are planning to start a program, which type best describes you?<ul style="list-style-type: none">– You believed in the concept and wanted to help create a program– You were given the job of starting a CERT program along with other assigned duties  <p>CERT Program Manager: Keeping Your Program Going 10-5</p> <p>Display Slide 10-5</p> <p>You are not looking for responses from individuals but rather for participants to consider their own reasons for starting a CERT program.</p>	<p>Ask:</p> <h4>If you started your CERT program or are planning to start a program, which type best describes you?</h4> <ul style="list-style-type: none">▪ You believed in the concept and wanted to help create a program▪ You were given the job of starting a CERT program along with other assigned duties

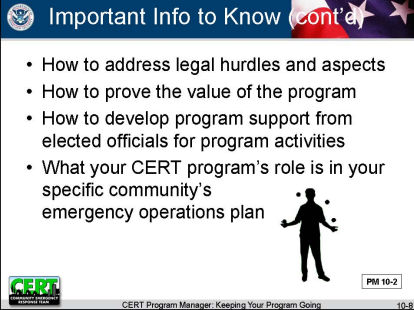

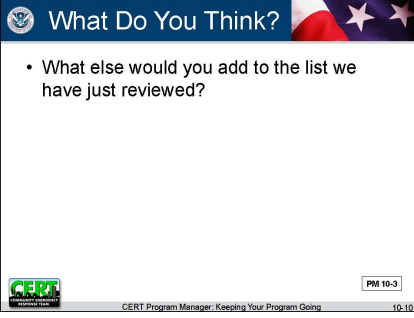
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

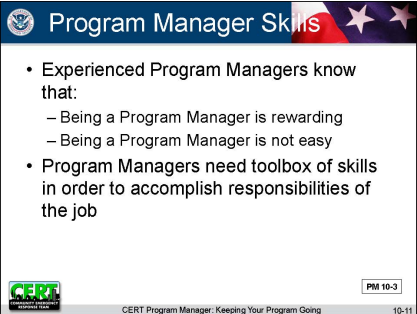
UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
<p>The Challenge</p> <ul style="list-style-type: none">• Keeping program going• Making sure that program is effective and stays strong and viable  <p><small>CERT Program Manager: Keeping Your Program Going 10-6</small></p>	<p>Summarize the discussion by saying that starting a CERT program is only part of the job. Once the program is underway, the real challenge begins – keeping the program going and making sure that it is effective and stays strong and viable.</p>
<p>Display Slide 10-6</p> <p>Important Info to Know</p> <ul style="list-style-type: none">• How to manage volunteers• How to accommodate all volunteers• How to promote program to community, media, elected officials, potential sponsors, etc.• How to convince veteran police and fire chiefs to use volunteers• How to manage time commitment and amount of resources required to run a successful program <p><small>CERT Program Manager: Keeping Your Program Going 10-7</small></p>	<p>Tell participants that there are certain things a person must know to start and maintain a CERT program. These include but are not limited to:</p> <ul style="list-style-type: none">▪ How to manage volunteers (and how it differs from managing staff), including recruitment, retention, and termination▪ How to accommodate all the volunteers regardless of skills and abilities▪ How to promote the program to the community, media, elected officials, potential sponsors, etc.▪ How to convince veteran police and fire chiefs to want to use volunteers by building organizational support/sponsorship▪ How to manage the time commitment and amount of resources required to run a successful program (whether your CERT position is employing you or not)
<p>Display Slide 10-7</p>	<p>(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

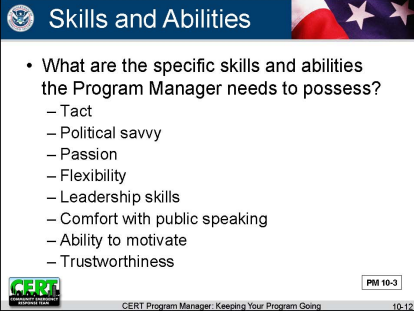
UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
 <p>Important Info to Know (cont'd)</p> <ul style="list-style-type: none">• How to address legal hurdles and aspects• How to prove the value of the program• How to develop program support from elected officials for program activities• What your CERT program's role is in your specific community's emergency operations plan <p>CERT Program Manager: Keeping Your Program Going 10-8</p>	<ul style="list-style-type: none">▪ How to properly address legal hurdles and aspects of the program▪ How to prove the value of the program (ability to quantify the program's effectiveness)▪ How to develop program support from elected officials for program activities (such as giving credit for CERT high school training)▪ What your CERT program's role is in your specific community's emergency operations plan
<p>Display Slide 10-8</p>  <p>Requirements Vary</p> <ul style="list-style-type: none">• Vary by community• Vary by region <p>CERT Program Manager: Keeping Your Program Going 10-9</p>	<p>Say that this list is not exhaustive by any means. It will vary by community and/or the region in which the CERT program exists.</p>
<p>Display Slide 10-9</p>  <p>What Do You Think?</p> <ul style="list-style-type: none">• What else would you add to the list we have just reviewed? <p>CERT Program Manager: Keeping Your Program Going 10-10</p>	<p>Ask:</p> <p>What else would you add to this list?</p>
<p>Display Slide 10-10</p> <p>Conduct a class discussion by asking this question. Record responses on an easel pad. See list below for possible responses.</p> <p>Some possible responses may include the following:</p>	<p>(continued)</p>

INSTRUCTOR GUIDANCE	CONTENT
<ul style="list-style-type: none"> ▪ Funding strategies such as sponsorships, affiliations, and grants and grant writing necessary to get them ▪ Data management ▪ Equipment management and needs (and deploying it for activations) ▪ Audit preparation and readiness (e.g., knowing where each sensitive item is kept, etc.) ▪ Training: Initial, ongoing, and supplemental training ▪ How to see the big picture: State and national organizational structure and where your CERT program fits <div data-bbox="191 1182 605 1493" style="border: 1px solid black; padding: 5px;">  <p>Program Manager Skills</p> <ul style="list-style-type: none"> • Experienced Program Managers know that: <ul style="list-style-type: none"> – Being a Program Manager is rewarding – Being a Program Manager is not easy • Program Managers need toolbox of skills in order to accomplish responsibilities of the job <p><small>CERT Program Manager: Keeping Your Program Going 10-11</small></p> </div> <p>Display Slide 10-11</p>	<p>Skills the Program Manager Needs</p> <p>Tell participants that experienced Program Managers know that being a Program Manager is rewarding. They also know that it is not easy. Program Managers need a toolbox of skills in order to accomplish the responsibilities of the job.</p>

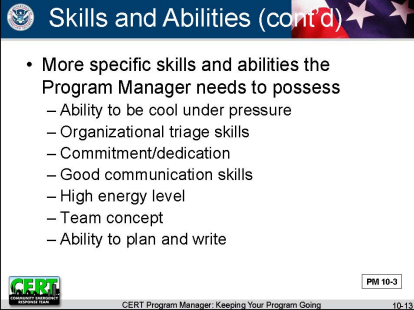
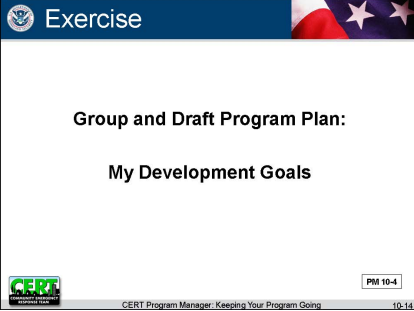
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
 <p>Skills and Abilities</p> <ul style="list-style-type: none">• What are the specific skills and abilities the Program Manager needs to possess?<ul style="list-style-type: none">– Tact– Political savvy– Passion– Flexibility– Leadership skills– Comfort with public speaking– Ability to motivate– Trustworthiness <p>Display Slide 10-12</p> <p>This slide is animated. The first click displays the question.</p> <p>Conduct a class discussion by asking this question. Record responses on an easel pad. Make sure that the list includes the items in the slide below as it will be needed for the exercise.</p> <p>The second click displays the responses.</p>	<p>Ask:</p> <p>What are the specific skills and abilities the Program Manager needs to possess?</p> <p>Summarize the discussion by saying that a listing of Program Manager skills and abilities was developed as part of the design process of this course. The list includes:</p> <ul style="list-style-type: none">▪ Tact▪ Political savvy▪ Passion▪ Flexibility▪ Leadership skills▪ Comfort with public speaking▪ Ability to motivate▪ Trustworthiness <p>(continued)</p>


COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

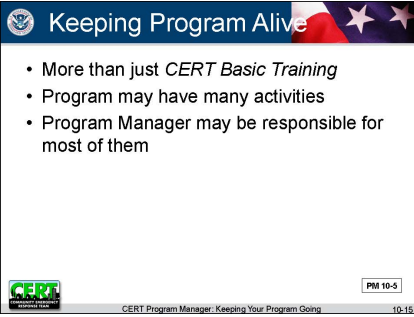
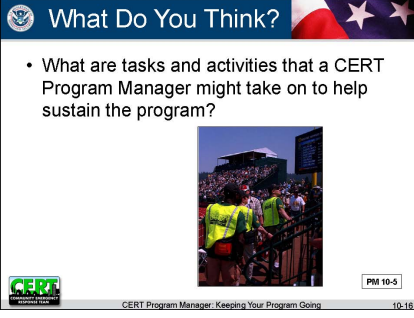
UNIT 10: KEEPING YOUR PROGRAM GOING

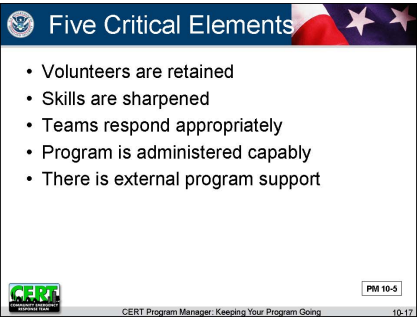
INSTRUCTOR GUIDANCE	CONTENT
 <p>Skills and Abilities (cont'd)</p> <ul style="list-style-type: none">• More specific skills and abilities the Program Manager needs to possess<ul style="list-style-type: none">– Ability to be cool under pressure– Organizational triage skills– Commitment/dedication– Good communication skills– High energy level– Team concept– Ability to plan and write <p>Display Slide 10-13</p> <p>This slide is animated. The first click displays the question.</p> <p>The second click displays the responses.</p> <p>Before moving on, ask the participants if they have any questions.</p>	<ul style="list-style-type: none">▪ Ability to be cool under pressure▪ Organizational triage skills▪ Commitment/dedication▪ Good communication skills▪ High energy level▪ Team concept▪ Ability to plan and to write
 <p>Exercise</p> <p>Group and Draft Program Plan: My Development Goals</p> <p>Display Slide 10-14</p> <p>This is a two-part exercise: the first part is done as a group; the second part is done individually.</p>	<p>Exercise: Group and Draft Program Plan: My Development Goals</p> <p>Remind participants that being a Program Manager is both satisfying and challenging. Participants need to determine where their strengths are and where they need to learn more, what they need to do themselves, and what they can delegate.</p> <p>Purpose: This exercise allows participants to identify specific areas of strength, areas of weakness, and areas that can be delegated to others.</p> <p>(continued)</p>

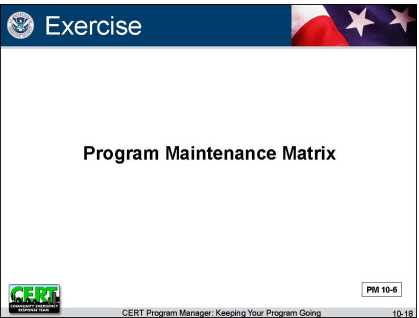
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
	<p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none">1. Refer participants to the easel pad listing of the Program Manager’s desired skills and abilities.2. As a group, work through the list and ask participants to identify:<ol style="list-style-type: none">a. Which of these skills and abilities can be learnedb. Which of these skills and abilities can be delegated to others (for example, grant writing)3. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. Ask them to complete the first part of the tenth section, <i>Keeping the Program Going</i>.<ol style="list-style-type: none">a. Three areas where they do well (three strengths)b. Three areas where they want some additional trainingc. Three areas that they might want to delegate or share <p>Debrief: Summarize the activity by saying that the exercise is a self-assessment that Program Managers can use to identify the best next steps for their own development.</p> <p>Do you have any more questions about the essential skills and abilities of the Program Manager?</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>Keeping Program Alive</p> <ul style="list-style-type: none"> • More than just <i>CERT Basic Training</i> • Program may have many activities • Program Manager may be responsible for most of them <p><small>CERT Program Manager: Keeping Your Program Going 10-15</small></p>	<p><i>Keeping a Program Alive</i></p> <p>Say that, given all the concepts covered so far, it should be clear that there is a lot more to running a CERT program than simply providing <i>CERT Basic Training</i>. A CERT program is usually involved in a number of activities and the CERT Program Manager will be responsible for most of them.</p>
<p>Display Slide 10-15</p>	
 <p>What Do You Think?</p> <ul style="list-style-type: none"> • What are tasks and activities that a CERT Program Manager might take on to help sustain the program? <p><small>CERT Program Manager: Keeping Your Program Going 10-16</small></p>	<p>Ask:</p> <p>What are tasks and activities that a CERT Program Manager might take on to help sustain the program?</p>
<p>Display Slide 10-16</p> <p>Conduct a class discussion by asking this question. Record responses on an easel pad so that participants can use the list during the exercise. Try to get at least 20 activities.</p> <p>Examples:</p> <ul style="list-style-type: none"> ▪ Drills and exercises ▪ Volunteer newsletter ▪ Annual report ▪ Developing non-emergency opportunities for CERT members to contribute to public safety 	

INSTRUCTOR GUIDANCE	CONTENT
 <p>Five Critical Elements</p> <ul style="list-style-type: none"> • Volunteers are retained • Skills are sharpened • Teams respond appropriately • Program is administered capably • There is external program support <p>Display Slide 10-17</p>	<p>Five Critical Elements</p> <p>Tell participants that keeping a program going involves five critical elements. All of the activities just mentioned address one or more of these five elements:</p> <ul style="list-style-type: none"> ▪ Volunteers are retained. ▪ Skills are sharpened. ▪ Teams respond effectively. ▪ Program is administered capably. ▪ There is external program support. <p>Stress that any program tasks and activities should support one or more of these elements of program maintenance.</p> <p>Explain that one program activity, if modified, might address multiple maintenance activities.</p> <p>For example, an exercise will help sharpen members' skills and team response; however, if provisions are made to engage fire department officers and elected officials as observers or participants, the exercise will also enhance external support.</p> <p>Note that the degree to which each activity will contribute to overall program vitality varies among local CERT programs. It is important for every Program Manager to assess how various activities will make the most difference in sustaining his or her local program.</p>

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 10-18</p> <p>PM, P. 10-7 to 10-8</p>	<p>Exercise: Program Maintenance Matrix</p> <p>Purpose: This exercise allows participants and the instructor to work together to identify actions that contribute most significantly to program maintenance.</p> <p>Instructions: Follow the steps below to conduct the exercise.</p> <ol style="list-style-type: none"> 1. Participants work individually. 2. Refer participants to the <i>Program Maintenance Matrix</i> in the Participant Guide and on the following page in the Instructor Guide. 3. Display the list of tasks and activities generated in the prior discussion. 4. Display the prepared easel pad page (or whiteboard) listing of the five critical elements of program maintenance. 5. Review the instructions: <ol style="list-style-type: none"> a. Ask for a volunteer to identify one task/activity from the list of tasks and activities generated in the prior discussion. b. Write the task/activity on the left-hand side of the prepared easel page. c. Ask participants to indicate which of the critical maintenance elements the task/activity supports. d. Place a check mark under the element(s) indicated. e. Continue until 17 of the activities have been transferred to the <i>Program Maintenance Matrix</i>. f. Review each of the 17 tasks/activities on the chart and count up the number of check marks for each. <p>(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
	<p>g. Point out which tasks/activities support more than one element. With a limited amount of time and resources, Program Managers will want to focus their energies where they have the greatest impact.</p> <p>6. Refer participants to the <i>Draft Program Plan</i> in Unit 1 of the Participant Manual and the Instructor Guide. Ask them to complete second part of the tenth section, <i>Keeping the Program Going</i>.</p> <p>7. Have participants individually record in their Draft Program Plan ideas they have for tasks/activities they may want to add or redesign to make program maintenance efforts most efficient.</p> <p>Debrief: Remind participants to plan their tasks and activities so that they get the biggest “bang for the buck” in terms of sustaining the program.</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

PM, P. 10-7 to 10-8	Exercise: Program Maintenance Matrix
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Directions: Enter a task or activity in the left column. For each task/activity, indicate with a check mark which critical program maintenance element(s) it best supports.

Task or Activity	Retain Volunteers	Sharpen Skills	Effective Team Response	Capable Program Administration	External Program Support




COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

Task or Activity	Retain Volunteers	Sharpen Skills	Effective Team Response	Capable Program Administration	External Program Support

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 10: KEEPING YOUR PROGRAM GOING

INSTRUCTOR GUIDANCE	CONTENT
<p data-bbox="191 359 602 401"> Unit Summary</p> <ul data-bbox="212 415 565 579" style="list-style-type: none">• Essential skills and abilities the Program Manager should possess• Critical elements involved in keeping a program alive• Use of a program maintenance matrix to identify activities that contribute most significantly to program maintenance <p data-bbox="191 632 602 667"> CERT Program Manager: Keeping Your Program Going PM 10-9 10-19</p> <p data-bbox="191 684 477 720">Display Slide 10-19</p> <p data-bbox="358 842 435 919"></p>	<p data-bbox="634 359 889 401">Unit Summary</p> <p data-bbox="634 415 1365 489">Tell participants that this unit has looked at program maintenance, specifically:</p> <ul data-bbox="634 506 1430 751" style="list-style-type: none">▪ Essential skills and abilities the Program Manager should possess▪ Critical elements involved in keeping a program alive▪ Use of a program maintenance matrix to identify activities that contribute most significantly to program maintenance <p data-bbox="634 842 1414 915">Do you have any questions about anything covered in this unit?</p> <p data-bbox="634 999 808 1031">Conclusion</p> <p data-bbox="634 1052 1373 1125">The next unit wraps up the <i>CERT Program Manager</i> course.</p>

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UNIT 11: COURSE SUMMARY AND CONCLUSION

In this unit you will:

- **Take the Post-Test**
- **Review the Course Learning Objectives**
- **Review Participant Expectations**
- **Receive a Certificate of Completion**

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COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

LEARNING OBJECTIVES/ PERFORMANCE OUTCOMES	<p>At the conclusion of this unit, the participants will be able to assess:</p> <ul style="list-style-type: none">▪ How much they learned in the <i>CERT Program Manager</i> course.▪ Whether their expectations were met.
SCOPE	<p>The topics that will be covered in this unit are:</p> <ul style="list-style-type: none">▪ Post-Test▪ Review of Course Expectations▪ Review of Participant Expectations▪ Next Steps▪ Graduation
ESTIMATED COMPLETION TIME	<p>30 minutes</p> <p>The agenda allows an additional 45 minutes in case previous units have taken longer or for any local activities.</p>
TRAINING METHODS	<p>As participants enter the classroom, the instructor distributes the Post-Test and asks participants to complete it. The instructor then reviews the Post-Test by giving the correct answers.</p> <p>Answers for the Post-Test:</p> <ol style="list-style-type: none">1. b2. d3. a4. a, b, c, d5. There should be checkmarks in every box.6. e7. b8. c9. a10. b

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

11. d

12. a

13. a, b, d

14. b

15. d

16. a, c, d, e, f

17. a, b, c, d, e

Next the instructor reviews the course objectives.

Then the instructor reviews the participants' expectations, generated in Unit 1, to see if they were met. If any expectations were not addressed in the course, the instructor tells the participant how the expectation can be met.

Finally the instructor thanks the participants and presents the certificates of completion.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

RESOURCES REQUIRED

- *Community Emergency Response Team Program Manager Instructor Guide* (for instructors)
- *Community Emergency Response Team Program Manager Participant Manual* (for all participants)
- PowerPoint slides 11-1 to 11-7
- Copies of the Post-Test, one for each participant
- Certificates of completion, one for each participant

EQUIPMENT

The following additional equipment is required for this unit:

- A computer with PowerPoint software
- A computer projector and screen

PREPARATION

Post-Test

Make copies of the Post-Test, one for each participant. The blank Post-Test follows these notes, just prior to the lesson plan for Unit 11.

Expectations

Review the expectations list. For any of the expectations that have not been met, identify a suggestion to give to the participant.

If the pages of expectations have been moved during the course, move them so that they are visible to all.

Certificates of Completion

Make a certificate of completion for each participant.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

NOTES

A suggested time plan for this unit is as follows:

Post-Test 10 minutes

Review of Course Learning Objectives..... 5 minutes

Review of Participant Expectations 5 minutes

Next Steps 2 minutes

Graduation..... 8 minutes

Total Time: 30 minutes

REMARKS

It is best if all the instructors are present at the graduation.

CERT Program Manager Post-Test

Name: _____

You have 5 minutes to complete this Post-Test.

1. When did CERT programs first come into existence?
 - a. 1980-1984
 - b. 1985-1989
 - c. 1990-1994
 - d. 1995-1999

2. A CERT program is NEVER involved with this activity.
 - a. Missing person search
 - b. Crowd and traffic control
 - c. Debris removal after a flood
 - d. Conducting search and rescue operations in a collapsed building
 - e. Supplementing fire tower staff during fire season

3. A Program Manager needs to prepare before meeting with a potential partner. Which of these does not need to be done during that preparation?
 - a. Develop a newsletter.
 - b. Prepare talking points.
 - c. Research the organization.
 - d. Prepare a program description.
 - e. Identify ways you can help each other.

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

4. One way to evaluate your program's goals is with a SWOT Analysis. What does a SWOT Analysis help you identify? Circle all that apply.
- a. Strengths
 - b. Threats
 - c. Weaknesses
 - d. Opportunities

5. Check which activities you do with which group.

	Volunteers	Instructors
Recruit		
Orient		
Track		
Manage		
Retain		
Terminate		

6. What issue is a Program Manager NOT likely to address when managing resources?
- a. What resources do I need?
 - b. Where will I get the resources?
 - c. How much will the resources cost?
 - d. Where will I store the resources?
 - e. How do I get rid of excess resources?

7. Every CERT program has the same goal.
- a. True
 - b. False

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

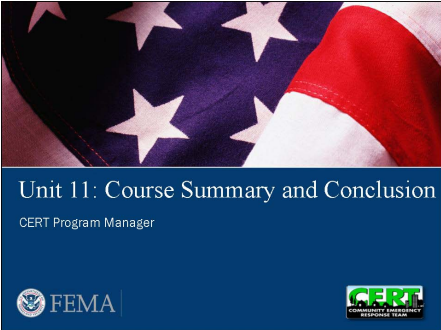
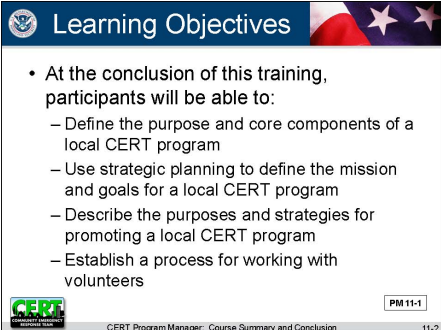
8. _____ is an important part of program evaluation, risk management, goal setting, and funding.
- A training facility
 - Program promotion
 - Good recordkeeping
 - A Program Report
9. What is the first thing to do when approaching funders and partners?
- Create a program description.
 - Schedule a one-on-one meeting.
 - Develop a plan for approaching the funder or partner.
10. The *CERT Basic Training* should never be tailored by the local CERT program.
- True
 - False
11. A CERT program should create a Training and Exercise Plan that complies with the requirements of: (Select one.)
- NIMS
 - ISO 700
 - Homeland Security Act
 - HSEEP
12. Which comes first? (Choose the best answer.)
- Setting goals for the program
 - Promoting the program
 - Finding funding for the program
 - Educating people about the program

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

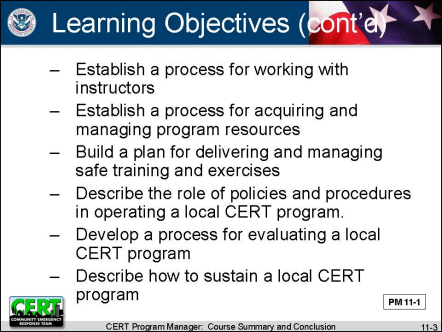
13. These are some signs that policies and procedures need to be reviewed and updated. Choose all that apply.
- An increase in the number of injuries or ineffective team operations
 - More questions on what are “normal operations” or a feeling of general confusion
 - Too many volunteers
 - Complaints about poor performance from the sponsoring agency, partners, or the community
 - An increase in donations
14. A particularly important policy area is _____.
- The correct CERT uniform
 - Safety concerns during CERT activities and CERT training
 - That every CERT member recruit one new member
 - What funding the program will accept
15. A Program Report should be developed at least:
- Weekly
 - Monthly
 - Bi-monthly
 - Annually
16. Program objectives have five characteristics. Circle the five that apply.
- Achievable
 - Funded
 - Realistic
 - Timely
 - Measurable
 - Simple
17. Keeping a program going involves these critical elements. Circle all that apply.
- Volunteers are retained.
 - Skills are sharpened.
 - Teams respond effectively.
 - The program is administered capably.
 - There is external program support.

Unit 11: Course Summary

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 11-1</p> <p>As an alternative, ask participants to volunteer the correct responses.</p>	<p>Post-Test</p> <p>Distribute a Post-Test to each participant and ask participants to complete it.</p> <p>After 5 minutes, give the correct answers to the Post-Test.</p> <p>Discuss any questions that participants might have.</p>
 <p>Display Slide 11-2</p>	<p>Review of Course Learning Objectives</p> <p>Review the learning objectives for the <i>CERT Program Manager</i> course, explaining that these objectives describe the behaviors expected from participants by the conclusion of the <i>CERT Program Manager</i> course.</p> <p>(continued)</p>

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 11-3</p> <p>Refer the participants to the Participant Manual for the “sub” learning objectives.</p>	<p>Continue reviewing the learning objectives for the course. Remind participants that the course developers were very thorough about what performance they wanted from <i>CERT Program Manager</i> course participants.</p> <p>Say that the full list of learning objectives or performance outcomes is in the Participant Manual and that this slide just has the 10 primary learning objectives.</p> <p>Quickly summarize the “sub” learning objectives. Tell participants that they should now be able to:</p> <ol style="list-style-type: none">1. Define the purpose and core components of a local CERT program.2. Use strategic planning to define the mission and goals for a local CERT program.<ol style="list-style-type: none">a. Explain why a CERT program must have clearly defined goals and objectives.b. Establish draft goals and objectives for a CERT program.

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UNIT 11: COURSE SUMMARY AND CONCLUSION

INSTRUCTOR GUIDANCE	CONTENT
	<ul style="list-style-type: none">3. Describe the purposes and strategies for promoting a local CERT program.<ul style="list-style-type: none">a. Explain expected outcomes for program promotion.b. Identify community organizations to target for partnership.c. Identify strategies for developing and maintaining partnerships.d. Explain how the process of goal setting is linked to program promotion.e. Articulate CERT core messages to include in program promotion.f. Identify techniques for promoting a program to various audiences.4. Establish a process for working with volunteers.<ul style="list-style-type: none">a. Describe how to recruit volunteers.b. Describe how to orient volunteers.c. Explain why to track volunteers.d. Describe methods for managing volunteers.e. Identify techniques for retaining volunteers.f. Identify strategies for firing volunteers.5. Establish a process for working with instructors.<ul style="list-style-type: none">a. Describe how to recruit instructors.b. Describe how to orient instructors.c. Explain why to track instructors.d. Describe methods for managing instructors.e. Identify techniques for retaining instructors.f. Explain what to do when terminating an instructor.

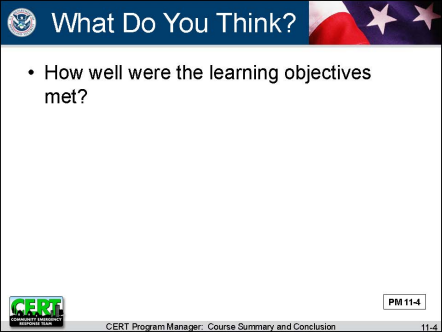
COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

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INSTRUCTOR GUIDANCE	CONTENT
	<ul style="list-style-type: none">6. Establish a process for acquiring and managing program resources.<ul style="list-style-type: none">a. Identify types of resources needed to coordinate a CERT program.b. Identify types of data that need to be collected and maintained for the program.c. Develop strategies for locating and managing resources.d. Identify program funding options and tips for approaching funders.e. Develop a draft program budget.7. Build a plan for delivering and managing safe training and exercises.<ul style="list-style-type: none">a. Identify training and exercises that are required or available for CERT volunteers.b. Explain how to tailor content from <i>CERT Basic Training</i>.c. Identify tasks required for managing CERT trainings.d. Describe the elements of a CERT Training and Exercise Plan.e. Explain how to ensure safety during training and exercises.8. Describe the role of policies and procedures in operating a local CERT program.<ul style="list-style-type: none">a. Explain why policies and procedures are necessary for running a successful program.b. Identify policies and procedures necessary for starting and maintaining a program.c. Identify resources for developing program policies and procedures.

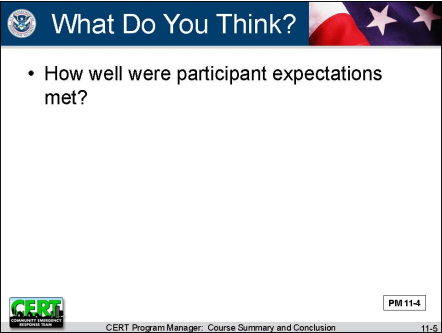

COMMUNITY EMERGENCY RESPONSE TEAM PROGRAM MANAGER COURSE

UNIT 11: COURSE SUMMARY AND CONCLUSION

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 11-4</p> <p>This will be an oral evaluation of the course.</p>	<p>9. Develop a process for evaluating a local CERT program.</p> <ul style="list-style-type: none">a. Explain what program evaluation is.b. Describe the purpose of evaluating a program.c. List the steps for evaluating various program components.d. Identify the characteristics of a Program Report. <p>10. Describe how to sustain a local CERT program.</p> <ul style="list-style-type: none">a. Describe the knowledge, skills, and abilities a Program Manager must possess in order to coordinate a program.b. Identify elements necessary for sustaining a program.c. Explain a technique for identifying program activities that contribute most significantly to program maintenance. <p>Ask participants this question: How well were the learning objectives met?</p>


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UNIT 11: COURSE SUMMARY AND CONCLUSION

INSTRUCTOR GUIDANCE	CONTENT
 <p>What Do You Think?</p> <ul style="list-style-type: none">How well were participant expectations met? <p>CERT Program Manager: Course Summary and Conclusion 11-5</p>	<h3><i>Participant Expectations</i></h3> <p>Review the list of participants' expectations for the <i>CERT Program Manager</i> course.</p> <p>Read each expectation and ask:</p> <p>Was this expectation met?</p> <p>If the expectation was not met, offer a way for the expectation to be met (another course, someone to talk to, something to read).</p>
 <p>Next Steps</p> <p>Keep the momentum going!</p> <p>CERT Program Manager: Course Summary and Conclusion 11-6</p>	<h3><i>Next Steps</i></h3> <p>Congratulate participants.</p> <p>Tell them that they have done a lot of work in this course and they are leaving with a Draft Program Plan.</p> <p>Tell participants that they have a few choices:</p> <ul style="list-style-type: none">They can go home and stuff the plan in a drawer and forget about it.Or they can decide that they have had an opportunity that most Program Managers would envy: to spend some time thinking about the program and program activities, rather than just responding to the most urgent needs. <p>Urge participants to take advantage of the head start they have. Here are some suggestions.</p> <ul style="list-style-type: none">Add good ideas right now to your to-do list.Put a memo on your calendar to pull this plan out in a month and see what more you want to add.As you have activities that were discussed in the training, remember to review what you put in the plan. It may help you focus your thoughts.

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UNIT 11: COURSE SUMMARY AND CONCLUSION

INSTRUCTOR GUIDANCE	CONTENT
 <p>Display Slide 11-7</p>	<p><i>Graduation</i></p> <p>Thank all of the participants for attending the <i>CERT Program Manager</i> course.</p> <p>Distribute a certificate of completion to each participant and thank each personally for attending the course.</p>

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