



Workplace CERT

Starter Guide



FEMA



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INTRODUCTION

What is CERT?

Community Emergency Response Team (CERT) is a nationally supported, locally implemented program that teaches people how to be better prepared for hazards that may affect their communities and trains them in basic disaster response skills such as fire safety, light search and rescue, team organization, and disaster medical operations. Local CERT programs train and organize teams of volunteers to safely assist their families, neighbors, co-workers, and other community members during emergencies when professional responders may not be immediately available to provide assistance. During disasters, CERT volunteer teams perform basic response activities, including checking in on their neighbors following an incident, distributing information to the public, supporting emergency operations centers, and helping to manage traffic and crowds. This allows professional responders to focus their efforts on more complex tasks. CERT volunteers also support their communities by organizing, promoting, and participating in emergency preparedness events, activities, and projects.

The Los Angeles Fire Department (LAFD) developed the CERT program after examining the civilian response to disasters in Mexico and Japan in 1985. LAFD recognized that citizens are likely to be on their own during the early stages of disaster and that under these circumstances family members, co-workers, and neighbors will often come to the aid of each other. While untrained volunteers can be very effective in aiding others, their lack of training puts them at risk for injury or death. For example, during the response to the 1985 Mexico City earthquake that claimed over 10,000 lives, untrained volunteers saved 700 lives, but 100 volunteers died in the process. In response, LAFD decided to develop and offer disaster response training to citizens so that during disasters volunteers can assist in a safe, responsible, and effective manner. LAFD piloted the first CERT training in 1986. Today, Federal Emergency Management Agency (FEMA) administers the CERT program, which has spread to every state and territory in the United States.

Each CERT program may organize, manage, and coordinate one or multiple teams of volunteers within the area that it serves. The structure of each program varies: In some communities, programs set bylaws and establish a leadership group with a president, vice president, secretary, and treasurer. In general however, CERT team leaders report to a program manager. Teams may meet periodically, but generally have a more operational role, participating in emergency and non-emergency activities. When active, teams may work individually or in concert at the direction and with the support of the program manager.

Purpose of Workplace CERT

A Workplace CERT program can support and enhance existing capabilities, and CERT volunteers can participate in efforts to increase the preparedness and resilience of the workplace and community. A Workplace CERT program equips employees with skills that enable them to perform basic disaster response operations in an emergency. Having trained volunteers available on staff helps protect the health, safety, and lives of people at your workplace. Workplace CERT volunteers are trained using the CERT Basic Training curriculum.

A CERT program can increase workplace resilience by increasing personal preparedness, allowing employees to return to work more quickly after a disaster. For organizations with a large public-facing component, such as grocery stores or shopping malls, CERT can also help serve the public in the event of an emergency. CERT training will ensure employees have the knowledge and skills to act quickly. Workplace CERT volunteers can also support the non-emergency needs of the workplace. For example, appropriately trained Workplace CERT volunteers can help manage traffic and crowds at large events and functions. However, while CERT volunteers learn a variety of skills, they are not professional responders and should not act beyond their training.

Federal, state, and local government officials generally expect Workplace CERT programs to limit their activities, especially response activities, to workplace property. However, Workplace CERT programs may be able to support CERT activities elsewhere in the community at the invitation of a local government emergency response organization (typically a police or fire department or emergency management agency), or per the terms of a formal agreement between the business or organization that oversees the Workplace CERT program and a local government emergency response organization.

Some employers may be interested in making CERT training available to employees, but not necessarily starting their own program. If that is the case at your workplace, please reach out to your local CERT program or your state CERT program manager to ask if they can provide training for employees. You can look up the contact information for your local CERT program at www.fema.gov/cert and for your state program manager by going to www.ready.gov/citizen-corps/find-my-state-program-manager and clicking on “state/territory point of contact.”

Purpose of Workplace CERT Starter Guide

The *Workplace CERT Starter Guide* is designed to assist the individual or team responsible for planning and implementing CERT in your workplace. Each Workplace CERT program will be unique to the specific needs of the workplace it serves. This guide should be a reference rather than a prescriptive how-to manual for starting a Workplace CERT program.

SECTION ONE: BUILDING SUPPORT

Evaluate Workplace Needs

Before you get started, think through how a CERT program can best serve your workplace's needs. Consider the hazards and threats that exist in your local community, as well as the existing response resources in your workplace and/or in the surrounding area.

Stakeholders who can help you with this process include:

- Workplace safety department(s), staff, and leadership.
- Emergency management and/or first responders in the local community.
- Local Citizen Corps Councils and CERT programs. You can find nearby Citizen Corps Councils and CERT programs at <http://www.ready.gov/citizen-corps/find-your-nearest-council>.

Every workplace is different, with unique hazards and preparedness requirements. You should tailor your Workplace CERT program to address the specific needs and requirements of your workplace and the hazards most likely to affect your area and to support existing response capabilities. One planning technique that helps organizations make more effective use of their CERT program is conducting a gap analysis. Organizations use gap analyses to identify threats and hazards, assess existing capabilities to prepare for or respond to those threats or hazards, and determine the gaps that exist between the threats or hazards and current capabilities. To maximize the value of your CERT program, you should prioritize CERT activities and create goals that will help to address any gaps you identify. Conducting a hazard assessment is an important early step in planning your Workplace CERT program.

Conduct or Review Hazard Assessment

Consider starting by analyzing the risks to your workplace based on the people, processes, and technology operating in your work environment. Within your organization, current assessments may already exist, so start by reviewing what is readily available. You may be able to find current assessments in your workplace's Business Continuity Plan, Business Impact Analysis, Emergency Operations Plan, or Emergency Action Plan. The department or individual responsible for workplace safety in your organization may be able to share these documents with you. Local emergency managers and professional responders are also excellent resources for information about the threats and hazards most likely to affect your area. Emergency management and safety officials at your workplace and in the wider community may also be able to share useful information about existing local capabilities to address relevant threats and hazards.

If you are not able to find an existing hazard assessment, you can conduct your own by identifying and prioritizing your threats and hazards. When conducting your assessment, include experts from within your organization, such as risk/continuity managers, and from the community, including emergency managers and police, fire, and emergency medical service responders. For more information about conducting a hazard assessment, please see Appendix B.

Once you have completed or reviewed a hazard assessment, speak with staff members and leadership responsible for workplace safety about your organization's capabilities to address relevant hazards. Identifying gaps between existing capabilities and potential threats and hazards may help you to prioritize strategic goals, objectives, and activities for your CERT program that address these gaps.

The Pitch

Preparing for the Pitch

The support of your workplace leadership will be vital to the success of your program, but there are several ways to prepare before you pitch CERT. While this section and the following one on speaking with management and leadership offer some suggestions for presenting your program, they are intended as general recommendations, not a prescriptive formula for a pitch. In your own efforts to secure support for CERT, be flexible and consider what will be most effective for your specific organization, given its culture, structure, priorities, needs, and other contextual factors.

Consider speaking to the local CERT program manager first if there is a program in your community. The local CERT program manager can help you prepare to discuss CERT with your leadership. He or she may also be able to put you in touch with local emergency services officials who can become advocates for developing a Workplace CERT program. Establishing a relationship with the local CERT program manager can help to ensure that your program will be regarded as an important partner in disaster preparedness and response. This may also lead to future opportunities to cross-train with their program's instructors and volunteers, participate in local drills and exercises, and support response and recovery efforts in the wider community in which your workplace resides. You may conclude that it makes more sense for your Workplace CERT to be a part of the local program, instead of a stand-alone program. But if you do establish an independent Workplace CERT program that limits its activities to private property (unless explicitly authorized or invited by a local government emergency response organization to engage in activities in the wider community), it would be beneficial to establish a relationship with the local CERT program. You will also need to make sure a local government emergency response organization supports and endorses your program. It is a good idea to cultivate a strong relationship with a local

government emergency response organization early on, as they can be very valuable partners as you establish and develop your program.

Other potential partners who may be able to help you prepare to speak with decision-makers about CERT include other workplace safety programs in your area, including any existing Workplace CERT programs, facility management personnel and leadership, and managers and staff members responsible for workplace safety. These partners may be able to help you tailor your pitch and address your intended audience more effectively, identify decision-makers who will need to support your proposal, and learn more about any formal and informal protocols for considering new initiatives at your workplace.

In preparing to meet with decision-makers, it may be a good idea to research successful CERT programs from throughout the country, including existing Workplace CERT programs. For example, consider browsing previous editions of the CERT E-Brief Newsletter on the National CERT website at <http://www.fema.gov/community-emergency-response-team-national-newsletter>. You can also reach out to other CERT programs throughout the country directly in communities facing similar threats and hazards, and ask for their guidance, advice, lessons learned, and effective practices.

Delivering the Pitch

When starting your program, plan to meet early on with key stakeholders, including management/leadership, to discuss your proposal. During your discussions, be ready to describe in detail the potential benefits of the program to your workplace and try to anticipate and preemptively address any concerns stakeholders may have. For example, be prepared to discuss costs and resource requirements for the program. Executive level and senior management support for your Workplace CERT program is vital to its success. Their buy-in will permit the implementation of the program to move forward, convey the importance of the program throughout your workplace, encourage managers to permit employees to attend training, and make it easier to secure funding and other resources for your program's activities. Share your Workplace CERT Business Plan (addressed in Section Two of this guide) with management/leadership during your initial meeting.

Your organization's leadership/management and any personnel responsible for workplace safety will likely have many questions about Workplace CERT during your initial discussions with them. The following are a few topics that you may want to model your pitch around and potential questions to anticipate. This guide will help you to develop appropriate responses for many of these.

Describe the Benefits

Begin by providing background information about the CERT program, as well as the benefits of the program for participants and your organization.

- Explain that CERT is nationally recognized and supported by FEMA.
- Stress that safety is the first priority of the CERT program.
- Training and organizing employees into teams of volunteers will help them to respond to emergencies in a safe, responsible, and effective manner when professional response services may be delayed or limited.
- Volunteers can also enhance efforts to make the workplace safer by assisting with emergency drills, addressing safety issues through peer mentoring, and conducting emergency and fire safety education presentations.
- Volunteers may also be able to support non-emergency events (e.g. company picnics and other functions) by helping to maintain situational awareness, direct crowds and traffic, and provide basic medical care if necessary, for example.
- Establishing a Workplace CERT program may also help your organization's leadership/management demonstrate to employees and community members they are committed to making your organization a safer place to work (and to visit, if your workplace is accessible to the public).
- Workplace CERT might also present an avenue through which the organization can strengthen its relationships with local professional response and emergency management agencies and other stakeholders.
- Employees learn skills that will help them to be better prepared at home, which may help them to return to work in a safer and timelier fashion in the event of a disaster.

Be prepared for the following questions related to the benefits and management of a CERT program:

- What can Workplace CERT volunteers do that emergency responders can't?
- What additional activities does a Workplace CERT program do?
- What are the skills that employees will learn that could help them with other work activities or activities outside of the office?
- What is the level of employee involvement required to keep a Workplace CERT program running?
- What does a Workplace CERT program need from management?

Describe the Training

Next, provide information on the CERT Basic Training course and explain that this course serves as the main training curriculum for all Workplace CERT programs.

- Provide general information about the CERT Basic Training course, including the topics included in the curriculum and the amount of time needed to complete the course.
- Emphasize that FEMA has developed standard materials for the course available online, including an instructor guide, participant manual and slide deck, and that local programs are encouraged to tailor the materials as needed to address community needs and priorities and relevant hazards.
- Explain that properly trained volunteers can help direct others during evacuation or shelter-in-place, and provide other assistance as needed, supplementing the efforts of professional responders.
- Discuss the value of training employees by identifying ways in which they could assist in emergency response efforts, particularly if they can help your workplace address any potential gaps in current capabilities.
- Never assume the value of the training is understood and be explicit about its benefits.

Be prepared for the following questions related to the CERT Basic Training curriculum:

- What is included in the Workplace CERT curriculum?
- How long is the training?
- Won't CERT training expose employee's to additional risk during an incident?
- Who will deliver the Workplace CERT training?

Describe the Costs

Explain the costs of a Workplace CERT program, including the cost of the training, and emphasize that they are low.

- If there is a CERT program in the same jurisdiction as the workplace, explain how that program may be able to support efforts to establish and maintain a Workplace CERT program. If not, mention that the state CERT program manager may be able to offer guidance and technical assistance.
- The local CERT program may be able to provide instructors or to invite workplace participants to the training sessions they offer to the general public.
- You may also be able to develop a cadre of trained CERT instructors among your organization's employees who can provide training for free.
- Mention that the program may need funds to cover the initial expense of training supplies and equipment.
- Your organization may be able to make a suitable room at the workplace available for free for training.
- Printed materials for the training are available free of charge through FEMA.

- Additional information on the costs of the program, and how to address them, will be covered in greater detail later on in this guide.

Be prepared for the following questions related to costs of a CERT program:

- What is the cost for running a Workplace CERT program?
- What is the liability of the business or organization that establishes the program?
- What are the business's/organizations financial commitments for establishing, evaluating, and sustaining the program?

Understanding Potential Roadblocks

Program Fatigue

One of the most important issues that CERT program managers should recognize is program fatigue. Over time, it can be challenging to maintain enthusiasm about a program and keep things fresh, and managers of the program (and participants) can also become burned out if they try to do too much too quickly. This happens to many organizations. Acknowledge that the program does not run itself and active, consistent engagement is necessary. But a healthy program is best served by sustainable efforts guided by a long-term strategy.

Many CERT programs also have to work at keeping volunteers engaged. Volunteers likely have many options for giving back to their communities, and if they feel as though they are not being offered opportunities to use or at least practice their skills, they may take their services elsewhere. Suggestions for engaging volunteers and keeping their skills sharp will be covered in Section Four of this guide.

Liability

Be sure to address this issue at the very beginning of any efforts to establish a Workplace CERT program. Stress that the first priority of CERT training is keeping volunteers safe and that participants learn skills that can help them to mitigate their personal risk during disasters. Instructors consistently tell participants “You are the most important person to keep safe.”

Be wary not to exaggerate or diminish the importance of liability considerations, but acknowledge them and emphasize the greater benefits of the program. CERT activities involve a degree of risk, whether it is the training itself or the types of situations to which CERT volunteers may be asked to respond. There is a risk of physical or emotional harm to CERT volunteers and to survivors to whom volunteers provide assistance. However, be sure to stress that during emergencies, people will proactively seek opportunities to help whether they have received training or not. Providing proper

disaster response instruction to potential volunteers that emphasizes personal safety, cooperating with professional responders, and working in teams is intended to reduce the risk of physical or emotional harm to volunteers and those whom they assist, resulting in better overall outcomes during emergencies.

Effective risk management can mitigate a number of potential risks associated with CERT. You should consider proactively addressing any liability concerns and risks associated with CERT participation by consulting with your organization's legal experts and following sound risk management policies. Guidance in this section does not constitute legal advice; you should always begin by speaking with your organization's legal counsel. Here are some basic things to consider:

- Review existing organizational insurance policies to determine if supplemental insurance is required to cover CERT program activities.
- Consult with legal counsel regarding the necessity of participant waivers; if used, be sure to properly secure the waivers and retain them for the appropriate amount of time.
- Use standard selection criteria for program participants, if applicable. Ensure criteria are published and available to potential participants at the time of application.
- Maintain written policies for all aspects of the program including activation, operations, instructor selection/hiring, etc.
- Maintain thorough documentation, in accordance with your organization's standard practices in confidentiality and security, for all activities, classes, drills, exercises, training, and activations.
- Ensure participants fully recognize the limitations of their training and understand they are not obligated to respond during any emergency.
- Verify that instructors are qualified and properly credentialed for the trainings they provide.

Many liability issues are state specific, so you should consult relevant state and federal laws and regulations on the subject. The *CERT Liability Guide: As Risk Management Overview for Local CERT Programs*, available at <https://www.fema.gov/library/viewRecord.do?id=6219>, provides more in-depth information about liability.

Resources

The costs of starting and maintaining a Workplace CERT program will depend on both the size and scope of your program (e.g., How many people will be trained each year? What supplemental tasks do you want your CERT volunteers to perform?) and the costs of goods and services in your area.

As you work through identifying your resource needs, consider the criteria that you will use to evaluate whether your program is adequately funded and whether you are effectively using the resources at your disposal. This information will also help you to grow and promote your program.

Section Two of this guide will cover additional information on securing resources for your CERT program. FEMA also hosted a webinar on developing resources for CERT programs, which is available here:

<https://icpd.adobeconnect.com/p4zrhbiqeml/?launcher=false&fcsContent=true&pbMode=normal>

SECTION TWO: DEVELOPING THE PROGRAM

Planning and Budgeting Your Program

Once you have identified the needs that your Workplace CERT can address, you should articulate the program's overall purpose and plan for its implementation. A purpose statement should succinctly describe the overarching goal of your program.

Sample Purpose Statement: "Workplace CERT supports our company's vision of an accident-free workplace by educating our employees about safety and preparedness, and empowering them to mitigate hazards and respond to emergencies."

These questions can help you to ensure that the design of your program aligns with its overall purpose:

- Does your company have existing preparedness/response capabilities in place that can be supported by a Workplace CERT?
- Will your Workplace CERT volunteers be encouraged to respond to daily emergencies as they go about daily interactions with the public?
- Would Workplace CERT volunteers from one workplace location owned and operated by your organization be expected to activate in response to an emergency at another location owned and operated by your organization?
- Would Workplace CERT volunteers activate to assist the community at large in the event of a major disaster? (Please ensure you discuss this with local emergency management and professional responder organizations and secure their formal permission first).
- What role, if any, can Workplace CERT volunteers play in regular business operations?
- Will your Workplace CERT engage in outreach and education efforts for employees who are not part of CERT or for the community at large?

Document Goals and Objectives

Once you have established the overall purpose of the program, you can set objectives for your Workplace CERT program.

Goals and objectives are specific outcomes that support the purpose statement. Goals and objectives should be SMART (Specific, Measurable, Attainable, Relevant, and Time-bound). When objectives are SMART, you are able to verify when they have been achieved, track progress, set priorities when you have limited time and resources, maintain focus, and ensure accountability.

Periodically, you will likely need to evaluate your program (discussed in Section 4) and help ensure that you are effectively meeting your objectives. Setting SMART objectives

will help to facilitate this process. Consider in advance how you will measure the goals you have identified, and how frequently you will conduct your evaluation. Many programs conduct evaluations annually, but you may decide to do so more or less frequently depending on your program.

Before finalizing your purpose statement and objectives, you should discuss them with your organization's leadership and any other stakeholders that helped you to identify the needs of your workplace and the surrounding community. This will help ensure your proposed objectives align with the needs of your organization or the community. This will also encourage buy-in, as stakeholders who feel some ownership of the program will likely be stronger advocates.

Develop a Workplace CERT Business Plan

After developing a purpose and objectives, you should create a business plan, which details how CERT will operate within your organization. This plan is most often an internal document, presented to senior leadership and other key internal stakeholders. It should do the following:

- Identify the value of CERT to the organization and critical gaps CERT can help address
- Discuss the proposed mission capabilities (purpose and objectives)
- Outline resource requirements including funding and personnel
- Present a draft timeline for implementation

The business plan is an important tool for promoting CERT within the organization and securing top-level support. It can assist you in fully developing the program and should be completed prior to meeting with senior leadership. For a sample outline of a business plan, please see Appendix B of this document.

Set Policies and Procedures

Every CERT program should clearly establish, in writing, policies and procedures regarding its management and operations. Documented policies and procedures facilitate consistency in day-to-day operational activities. Programs may also find it helpful to be able to refer to these guidelines whenever questions about the program and its activities arise. In addition, policies and procedures help eliminate common misunderstandings by defining roles and responsibilities and establishing boundaries, and by setting expectations for what volunteers will and will not do.

CERT programs should consider developing policies and procedures related to the following areas:

- Program Membership

- Program Operation
- Training and Education
- Uniform
- Communications
- Equipment
- Insurance and Liability
- Privacy Protection
- Code of Conduct
- Applicable State, Local, and Workplace Policies
- Credentialing
- Activation

As you develop policies and procedures, you should seek input from your organization's workplace safety department personnel and leadership, as well as any other stakeholders CERT volunteers may work with when activated. Periodically review and re-evaluate policies and procedures to verify that they are still relevant and continue to address the needs of your program, and update them as necessary.

Identify Resource Needs

Resources that you will need for your program may include, but are not limited to:

- Equipment, supplies, and training materials
- Facilities
- Other goods and materials
- Personnel
- Funding (generally to procure the resources listed above)

There are a variety of ways that you can develop resources to support your program, but many CERT programs find establishing strategic partnerships with key supporters and partners in the community to be an effective and sustainable approach.

Create a Budget

There are both one-time and on-going costs associated with starting and maintaining a CERT program. The CERT program manager should calculate the short-term (start-up) and long-term (program maintenance) costs associated with your program. It may also be helpful to calculate per-class or per-participant costs, not only for budgeting purposes, but also to help program partners understand the return on their investment. It is important to identify the cost of individual resources and to properly attribute cost savings achieved through donations and gifts in kind. Accurately recording the total cost of the program supports future reports on effectiveness and outcomes and helps you to calculate a value statement that demonstrates the continued benefit of the program.

Identify Partners

Local businesses, non-profit and faith-based organizations, local government emergency response organizations, Citizen Corps Councils, CERT programs, foundations and philanthropic organizations, and others may be willing to donate materials and other resources to your program. Your organization may be more willing to support your program's resource needs if you have strategically aligned your CERT program to address the organization's own specific needs and worked to make your program an asset to leadership/management and any managers and personnel with a role in workplace safety.

Possible local businesses you may want to approach include, but are not limited to:

- Big box stores
- Grocery stores
- Hardware stores
- Printing companies
- Utility companies

Possible local non-profit organizations you may want to approach include, but are not limited to:

- Chamber of Commerce
- Faith-based organizations
- Kiwanis and rotary clubs
- Neighborhood and homeowners associations
- American Legion
- Veterans of Foreign Wars
- American Red Cross
- Voluntary organizations active in disasters (VOADs)
- Teacher, police, and fire unions

Remember that support is not limited to materials or equipment. For example, a local utility company may be able to offer training in gas and electric safety for volunteers. Some individuals may also be willing to donate their time to support your program in very valuable ways. For example:

- Professional responders may be able to serve as instructors for parts of the training.
- Employees or others may be able to provide volunteer support for administrative tasks.

If you involve employees in resource development efforts, you may be able to organize a fundraiser or solicit donations at your workplace, though you should check with

management and legal counsel about requirements for, or restrictions against, fundraising.

Determine Incentives for Potential Partners and Create Tailored Pitches

Identify potential sponsors or volunteers and think about what might motivate them to contribute to your program. Consider the following questions before approaching a potential supporter:

- What does the organization do? What are its goals?
- What is the organization's interest in disaster preparedness in their community? How does the organization's mission align with CERT (and vice versa)?
- How can CERT benefit the organization?
- What might the organization offer CERT?
- If applicable, what relationships does the organization have with emergency management and professional response agencies?
- What is their fiscal year cycle?
- What is their current and historic charitable and donation activity?

Potential free marketing or publicity on Workplace CERT materials can be a big incentive for partners, so be sure to think about how you can publicly acknowledge those who support your program. For example, you could offer to place their logo on products and materials provided or paid for by them that will be distributed to or seen by the public. Keep in mind that efforts that increase your program's visibility and showcase its value, including drills, exercises, competitive events, and other activities, may also attract the attention of potential sponsors and new recruits for the program.

Record keeping is vitally important for any CERT program. Maintaining accurate records will help you to track and maintain the budget, and records will document partner-provided resources and their uses. This will be helpful for developing progress reports for partners so that you can provide them with feedback on the impact of their contributions. This guide will cover record keeping in greater detail in Section 4: Maintaining the Program and in Appendix B.

Identify information that you can use to strengthen your pitch. If possible, consider using both quantitative and qualitative data:

Quantitative:

- Number of participants trained
- Number of activations (if applicable)
- Survey data (for example, awareness of emergency preparedness at your workplace)

Qualitative:

- Testimonials and anecdotes (for example, support from professional responders or from others who have utilized or worked with Workplace CERT teams or volunteers)

If you are just starting your program, you may not have much data on hand. You should consider presenting success stories and data from existing nearby CERT programs, or from national reports like *Preparedness in America*, which can be found at: <http://www.fema.gov/media-library/assets/documents/71100>.

You should consider tailoring your pitch for specific groups and individuals. Discuss how your program will benefit the community and help address its needs, and describe your program's purpose and objectives. Be very specific about your program's needs, whether it is related to funding or another resource. For example, instead of saying that you need "supplies," specify which items you need. If a potential supporter knows your needs, they may be able to identify where they can offer resources. Discuss the anticipated impact of their support and how this will help you to achieve your program's goals. For example, if you are asking for personal protective equipment for 30 participants, explain that 30 participants will be physically safer during emergency operations and easier to identify for professional responders.

You should also explain the value and return on investment for the potential supporter, making it clear how they will benefit from supporting your program. Discuss a process for reporting results so that you can assure partners that you will be able to demonstrate tangible results and provide accurate and timely progress reports. Try to anticipate any potential issues or questions that may come up and address them preemptively in your pitch.

Meet with Potential Supporters in Person

In-person meetings are the best way to present your program to potential partners. If in-person meetings are not feasible, conference calls and read-ahead materials can be helpful as well. Consider presenting your Workplace CERT Business Plan to potential partners, and be explicit in identifying the benefits that the program offers to them and to the community as a whole. Based on feedback from potential partners, you may wish to revise your plan.

If you will be discussing resources with a partner, you should make it clear what you are asking for and hone in on your needs. Go to meetings with a clear plan, but be open to accepting resources that you might not have asked for and other opportunities that may present themselves during discussions.

Be sure to always thank partners, donors, and sponsors, and publically recognize them for their support. For example, you can thank them for their contribution on your website or in any promotional materials you may develop, such as a newsletter.

Identifying a Program Manager

An effective CERT program manager is often essential to the program's success. Recommend that your organization designate an individual to serve as the Workplace CERT program manager. Ideally, the program manager should have a background in emergency management. FEMA recommends that all CERT program managers complete the CERT Program Manager course, which is offered at the Emergency Management Institute (EMI) and by some state and local governments. Participants in courses offered at EMI in Emmitsburg, MD may be able to be reimbursed for their travel expenses. The training materials for the CERT Program Manager course are available online at: <http://www.fema.gov/community-emergency-response-teams/training-materials>.

CERT program managers:

- Develop strategic plans
- Tailor the program to address the needs of the community it serves
- Promote the program
- Work with CERT volunteers and instructors
- Establish the process for acquiring and managing program resources
- Plan and manage the delivery of safe training and exercises
- Develop policies and procedures
- Develop program evaluation processes
- Sustain the program long-term

SECTION THREE: CONDUCTING TRAINING

Preparing Curriculum

The CERT Basic Training is a standardized national curriculum, but it may be beneficial to add specific information about your workplace. Talk with your course instructor(s) about any additions to the curriculum that would make sense for your workplace.

FEMA also offers supplemental training modules specifically for CERT that cover a variety of topics, including a Traffic and Crowd Management Module and Flood Response Module. Additional trainings are also available through FEMA or through other organizations, such as the American Red Cross. Consider the role(s) you anticipate for your CERT program at your workplace, and plan the training accordingly. Materials for CERT supplemental training modules are available for download at <http://www.fema.gov/community-emergency-response-teams/training-materials>.

Continued training is necessary to keep skills sharp and is an excellent way to keep CERT volunteers engaged. Based on your training needs, you should create a training plan that outlines the number and types of trainings you intend to hold throughout the year. A training plan helps you manage your program costs, secure instructors, and ensure continued engagement of your volunteers. It is also an excellent tool to support recruitment and provides participants with a better understanding of the level of commitment required by your program.

Using Training Materials

Workplace CERT uses the same training materials—the instructor guide, participant manual, and slide deck—as other CERT programs. All materials are available for download on the national CERT website and you can order hard copies of the instructor guide and participant manual from the FEMA Warehouse. The state CERT program manager can help you process your order. However, you may want to customize materials to reference local hazards, disasters, and sites. Photos of the workplace will also make the training more relevant to participants.

There is a list of training props and supplies at the beginning of each unit in the instructor guide for the CERT Basic Training course. You may be able to ask local fire and police departments, or the local CERT program, to provide some of these materials.

Selecting Instructors

Identifying Instructors

Consistent, high quality training is an essential component of a successful CERT program. You should recruit and select instructors based on their working knowledge of the content and skills required for each unit of the curriculum. The CERT Train-the-

Trainer course can help prepare instructors to deliver the curriculum. If possible, CERT instructors should complete the Basic Training course as well.

FEMA recommends the following for all CERT instructors:

- At least two instructors should jointly conduct each unit of the curriculum. One should be a subject matter expert who knows the detailed content of the session while the other should be an instructor with a full knowledge of the CERT model and the entire curriculum.
- Because Units 3 and 4 of the CERT Basic Training address disaster medical operations, licensed or certified paramedics, emergency medical technicians, or nurses should lead these units.
- Skilled fire and rescue instructors who have completed the CERT Train-the-Trainer course should conduct all other units.
- Instructors should also be knowledgeable about:
 - The CERT model and the Basic Training curriculum.
 - The types of hazards that present the greatest risk to the workplace and surrounding community.
 - On-site and nearby buildings and other structures that present the greatest potential hazards in the event of a disaster (e.g., power plants).
 - The emergency operations plans for the workplace and the surrounding community.

Bear in mind that some state and local governments may require additional qualifications for CERT instructors in their jurisdictions. You may also want to set additional requirements for instructors for your specific program.

There are a number of people you can approach about serving as instructors. A local CERT program or Citizen Corps Council may have a list of recommended instructors, as may your state CERT Program Coordinator. You can also ask local emergency management staff members or first responders (either from among your own staff, if applicable, or from the local community).

You should consider potential instructors' credentials to determine whether they possess both the knowledge and skills to effectively convey the material they will be teaching. In CERT, hands-on training is particularly important, so instructors should be comfortable with this teaching method. Depending on the number of people that will be trained and the training schedule you have established, you may want to use multiple instructors for each class. Dividing the course between different instructors ensures people are able to teach to their expertise and exposes participants to different training styles.

Please reference the CERT Train-the-Trainer materials for additional information on qualities of an effective instructor. Those materials are available at

<http://www.fema.gov/community-emergency-response-teams/training-materials>. The Train-the-Trainer materials also include guidance on preparing for the training, managing the classroom, and maximizing learning.

Orienting and Training Instructors

Your CERT program will not need to provide CERT training if your employees will be participating in an offsite training course provided by a state or local CERT program. However, large organizations may choose to conduct their own training events for their volunteers in one of two ways. One possibility is working with a local government emergency response organization to arrange for a CERT instructor to lead an internal training course. Conversely, you may identify and train your own instructors prior to launching your first training. You will want to hold an orientation with potential instructors to discuss your expectations, as well as to introduce them to or update their knowledge of the CERT concept and the purpose and goals of your specific Workplace CERT program. You should also consider cross-training instructors, so they can step in for each other as needed. As your program develops, you may want to have potential instructors (or current instructors interested in cross-training) observe or co-teach some of the classes, so they can develop and broaden their expertise.

In preparing for launching your CERT program, you may want to conduct practice training sessions with the instructors. You may want to run through the whole curriculum, or allow each instructor to practice at least one session's worth of material. Conducting a practice session will allow you to identify any issues in advance (e.g., is all equipment working? Do the exercises run effectively as planned?) and will help your instructors to become more comfortable with presenting their material. Make the practice session as realistic as possible. For example, instructors can serve as participants/audiences for each other, ask questions, and run through the planned exercises and activities included in the curriculum. The more familiar your instructors can become with the content during practice, the more effective they will be during actual training sessions.

Scheduling

Once you have completed your training plan and identified instructors, you will need to schedule classes. In some cases, it may make sense to spread the course over a period of several weeks, scheduling 2-4 hour time blocks, or you may elect to do it as a series of consecutive full days. In either case, ensure you have adequate space for classroom and hands-on training. During the CERT Basic Training, you will need adequate space to create a mock disaster area for the final training exercise where you can operate without disturbing others.

You can opt to invite CERT Basic Training graduates back to participate in the drills and exercises that take place over the course of subsequent trainings to keep their skills sharp; they can also portray mock survivors.

Class Size

Optimum class size often depends on a number of different considerations, including physical classroom size (e.g., including enough floor space to accommodate hands-on skill practice in the classroom) and the availability of instructors, training equipment, and supplies. Successful CERT training typically includes team-building, hands-on practice, and effective coaching. Groups that are too large can reduce the benefit of these important factors.

Recruiting Participants

There are a number of ways you can recruit participants for your Workplace CERT program. Your organization may require participation by certain employees based on the nature or location of their jobs. In other cases, you may need to actively recruit volunteers to join the program. If you need to recruit volunteers, think about why people might be interested in joining the program. Possible motivations for joining or supporting your Workplace CERT program include:

- Being prepared to respond if they encounter an unexpected or dangerous situation at the workplace, or one in which immediate assistance is required, but professional help is not readily available
- Maintaining a safe work environment and learning skills that will help them to prepare for and respond to emergencies at work and at home
- Enhancing the capacity of the workplace to respond to and recover from emergencies or disasters

Possible ways to promote the program to staff include:

- Emails explaining the program, the benefits, and how to get involved
- One-on-one outreach to staff members who are likely to be interested
- Presentations at staff meetings
- Flyers left in staff mailboxes

Note that if you are planning to hold training sessions and exercises during work hours, employees may need permission from their supervisors to participate. Be sure to establish a process for securing those permissions.

Consider tracking information about the effectiveness of your recruitment efforts, particularly if you have program objectives related to the number of participants you recruit. When you conduct your program evaluation, this information can help you

assess the effectiveness of recruitment efforts and continually make improvements over time. Sample materials that you can use and tailor to recruit participants are available in Appendix A: Outreach Materials.

Application Process

If the participants of your Workplace CERT are not going to be assigned to the program, or the training is not open to everyone, you may need a process for selecting volunteers. You can allow people to sign up on a first-come, first-served basis (e.g., post a sign-up sheet in the break room) or you may establish a formal application process that evaluates applicants on information such as why they would like to join the CERT program and what skills and experiences they would bring to the team. If you choose to use a formal application, then you need to create an application form and a selection process. Be sure *not* to base the application on any criteria that could be considered discriminatory, and have the screening process reviewed by human resources staff and/or legal counsel.

Accessibility

Remember that CERT teaches skills that are beneficial to everyone. You should provide reasonable accommodation for individuals with disabilities and others with access and functional needs. Be upfront about the CERT program and what it entails, but also be aware that there are steps you can take to make the training accessible to everyone. Open a dialogue with anyone who has concerns or questions and work with them to provide a positive, respectful, and worthwhile training experience.

FEMA hosted a webinar featuring practices and recommendations for including individuals with disabilities and others with access and functional needs in CERT programs. You can view a recording of that webinar at: <https://icpd.adobeconnect.com/p1onuoh5wic/>. FEMA has also developed an All Abilities Annex that provides guidance to CERT instructors on how to work with people with disabilities and others with access and functional needs to ensure inclusive CERT training sessions. That is available here: <http://www.fema.gov/training-materials>.

SECTION FOUR: IMPLEMENTING AND MAINTAINING THE PROGRAM

Keeping Volunteers and Supporters Engaged

Sustaining a program is an ongoing effort. It is especially important to keep participants engaged. If you do not periodically provide volunteers with opportunities to practice, their skills (and interest in the program) can easily fade over time. Use ongoing training and communication to keep participants informed and involved. You should also consider how to best stay in contact with key stakeholder and partners who provide resources and other forms of support to your program and continually demonstrate the return on their investment.

Drills, Exercises, and Competitive Events

Drills and exercises can help volunteers to sharpen their skills, increase the effectiveness of teamwork, and keep participants enthusiastic and engaged in the program. Tailor workplace exercises to reflect relevant hazards, settings, and scenarios. Drills and exercises may also increase awareness about the Workplace CERT program and draw interest from potential new participants and partners. You may wish to invite local media to any exercises that could offer good photo opportunities. You should also coordinate with the local CERT program to discuss opportunities for joint trainings and exercises.

Competitive events can offer CERT volunteers the chance to validate, practice, and reinforce their skills and procedures in a challenging, fun, and competitive but friendly environment. The events typically consist of numerous skill and demonstration stations, with each team rotating from station to station, and usually involve multiple CERT programs. FEMA hosted a webinar on CERT competitive events, which is available at: <https://icpd.adobeconnect.com/p5pmxcpkwym/?launcher=false&fcsContent=true&pbMode=normal>.

FEMA has also developed a series of materials to help programs organize their own drills, tabletop exercises, functional and full-scale exercises, and competitive events. These are available online at <http://www.fema.gov/library/viewRecord.do?id=6214>. You also may want to develop your own exercises, tailored to local threats and the needs of your workplace. The exercise held at the end of the CERT Basic Training course can serve as a model for periodic exercises.

Local fire and law enforcement agencies may be able to help facilitate any drills or exercises you plan and organize at your workplace. They may also be able to invite Workplace CERT participants to portray survivors in their own drills and exercises. This provides a valuable resource for professional responders and a unique learning experience for CERT participants.

Additional Training Opportunities

Training is an excellent opportunity to bring volunteers together and increase the functional capabilities of your program. There are a variety of training topics outside the CERT Basic Training curriculum that may be applicable to CERT volunteers. Trainings are available through FEMA and a number of other organizations, including the American Red Cross, which offers courses in first aid, cardiopulmonary resuscitation (CPR), and the use of an automated external defibrillator (AED). You may also consider re-training/refreshing on specific skills within the curriculum, like those in the disaster medical operations units. Rotate training days and times to provide the greatest opportunity for volunteers to participate.

- Supplemental trainings available from the CERT program can be found at <http://www.fema.gov/community-emergency-response-teams/training-materials>:
 - CERT Animal Response Module I
 - CERT Animal Response Module II
 - CERT Emergency Communications Module
 - CERT Tools for Leadership Success Module
 - CERT Traffic and Crowd Management Module
 - Flood Response for CERTs
 - CERT Firefighter Rehab
 - CERT Exercise Swaps
- Through EMI, FEMA offers a variety of trainings. They can be found at <http://training.fema.gov/EMI/>.
- A number of local, state, and national organizations offer training that may be applicable to Workplace CERT programs. Ask your local emergency management and professional response agencies about other trainings that may be available for participants in your Workplace CERT program.

Community Outreach Events

CERT volunteers can be great advocates for preparedness in the workplace and the wider community by planning or participating in activities that encourage workplace or personal preparedness, such as:

- Conducting preparedness presentations at company lunches.
- Sharing preparedness information on bulletin boards or in public areas.
- Communicating preparedness information through the company blog or newsletter.
- Sending periodic emails with information specific to applicable threats (for example, sharing fire prevention information during Fire Prevention Week).
- Distributing preparedness kits branded with your company logo at industry events.

- Setting up informational booths at community events, such as fairs or races.

Communication

You should also consider how you can maintain consistent communications with CERT volunteers. This will help make them feel that they are part of an ongoing program, rather than an isolated training event. Consider asking for their feedback on the program, how it can be improved, and what they want to get out of it.

A periodic newsletter, an email distribution list, or a Workplace CERT webpage are all good ways to keep in contact with your volunteers, stakeholders, and other interested parties. Use these channels to share program successes, publicize upcoming trainings or other activities, recognize volunteers (and sponsors!) for their efforts and contributions, and generally keep stakeholders up to date on the program's activities. Encourage CERT volunteers to participate in maintaining these communication outlets.

Flyers in your workplace location, information sessions each quarter, or a booth in the building lobby (after getting permission from your supervisor) are all ways to share information about your program. You could even consider running a periodic preparedness column in your workplace communications, written by CERT volunteers. Social media outlets can also increase awareness of your program and its activities. Local media may also be interested in your program. Instead of waiting for them to come to you, consider proactively sharing your stories and building relationships with those outlets.

Integrating CERT into the Workplace Environment

By making Workplace CERT an integral fixture of where you work, you can help increase its likelihood of surviving and thriving. One of the most effective ways of ensuring that your Workplace CERT endures is to incorporate the CERT into your workplace disaster response plan and/or emergency operations plan. If you think this would benefit your workplace and your CERT program, be sure to work closely with managers and personnel responsible for workplace safety. Local emergency managers and CERT programs may also be able to help with this process. But keep in mind that not all places of work may want to incorporate CERT into their emergency response plans.

There are several other ways you can enhance the visibility of CERT in the workplace and make it a part of the culture of your business or organization. For example, trained employees may be able to support workplace safety drills, identify hazards, and fulfill specific roles during planned events and emergencies. Basic training graduation ceremonies are an excellent way to not only recognize accomplishments, but also to involve leadership and increase their engagement with the program and its volunteers. If possible, ask an executive at your workplace, or even an official from your local fire

department or emergency management agency, to speak at the ceremony and congratulate participants. You can also invite representatives of local media and any employees who are responsible for workplace communications.

Planning for Activation

Whether you plan to activate CERT volunteers for emergency events, non-emergency events, or both, it is very important to develop an activation plan. Ensure that the activation plan is comprehensive and that you share it with CERT volunteers so that they are clear on any rules and expectations. You should also develop your activation plan in very close coordination with managers and personnel responsible for workplace safety. Make sure that workplace safety leadership reviews and approves the plan prior to implementation, as they will most likely be responsible for activating volunteers and coordinating their efforts. Consult with your local jurisdiction if you would like your Workplace CERT volunteers to be eligible to support CERT activities in the surrounding community.

Some questions to consider in developing your plan include:

- Under what circumstances and based on what criteria will the Workplace CERT be activated?
- Who can activate the Workplace CERT?
- How will the activation be communicated to Workplace CERT volunteers?
- How will Workplace CERT volunteers be identified? Will they be issued badges?
- Do you have an established rendezvous point or staging area? Where?
- How will Workplace CERT volunteers be assigned to roles/teams during activation?
- How does the Workplace CERT interact with professional responders?
- What is the jurisdiction for the Workplace CERT program? Are Workplace CERT volunteers able to respond to incidents in the surrounding community, or are they limited to workplace property?
- In the event of a widespread disaster, will the Workplace CERT coordinate with CERTs or professional responders in the surrounding community? How?
- How will teams communicate (both within and between teams) during activation?
- How and when does an activation end?
- How will you debrief and follow-up with volunteers after an activation? Will you hold a group meeting or conduct a phone/online survey?

Activation Debriefing

In the event that your workplace activates CERT volunteers, you should conduct a debriefing meeting, or “hotwash,” after the event. The feedback from these meetings can help you refine your program going forward. This information is very important for

program evaluation and can help drive that process. You will likely want to identify what worked well during the activation, as well as what could be improved for next time. Discuss any concerns CERT volunteers had about the activation. You can also use the results of this conversation to identify any additional training that may be valuable for your program. If there is a community-wide debrief with responders from a variety of agencies or programs, you should request that a representative from your organization be invited to attend the meeting to discuss lessons learned with the entire response community. A sample after-action report is available in Appendix B of this guide.

Maintaining a Connection with the Local Community CERT

Local CERT programs can be an invaluable partner in establishing and maintaining your own program. In addition to sharing resources, ideas, and lessons learned with you as you develop and maintain your program, local CERT programs may also be able to offer opportunities that will help keep Workplace CERT participants engaged and their skills sharp. For example, Workplace CERT volunteers may be able to take part in training sessions (including refresher trainings), drills, exercises, and other events that the local CERT program organizes or participates in. There may even be some opportunities for your Workplace CERT program and the local CERT program to cross-train with one another.

Consider asking your local CERT program manager if your Workplace CERT volunteers can be eligible to support community events and respond to disasters when local CERT volunteers are activated. However, bear in mind eligibility may entail additional training and other requirements set by the local government agency that sponsors and activates the local CERT program, and that the local CERT program's activation protocols and procedures may differ from those you establish for your own program.

Whether it is during a training session, drill, exercise, or other event, close collaboration with the local CERT program can help you to refine and improve your Workplace CERT program, strengthen your ties with the existing program and possibly other local emergency management stakeholders, and provide your participants with the benefit of the experience of more seasoned local CERT volunteers and instructors.

Evaluating the Program

Evaluation is essential to make sure that your program is meeting its goals and the expectations of participants and to identify new ways in which your program can contribute to your workplace. Evaluation should be ongoing, but you should also conduct formal reviews on a periodic basis. If you conduct an official program evaluation each year, you can also use that to develop an annual report. Course corrections can be made in real time based on ad hoc feedback, but a formal process can help refine the overall direction of the program.

The individual or department with final say over changes to the program and its direction will vary in different places of work, but in all cases the CERT program manager should work closely with workplace safety leadership and personnel to develop evaluation forms and processes, review evaluation data, and discuss potential program changes.

Evaluation should begin from the very first session. Distribute formal evaluation forms to program participants after training sessions and other activities. Encourage participants to provide detailed feedback on the training so that you can make improvements for future sessions. The CERT program manager should also frequently attend training sessions to observe the quality of instruction and identify areas of improvement for instructors.

Conduct formal reviews at appropriate intervals based on the size of your program and how frequently you offer training. Ideally, as you develop and prepare to launch your program, you should consider how you would evaluate specific aspects of it. If you have not done so already, consider the types of data you will need to assess the successes and areas of improvement for your program, and how you will collect that data.

You also can conduct surveys of the workplace to assess general awareness of and perceptions about the program. Be sure to approach any stakeholders, partners, and sponsors for their feedback as well, through either written evaluations or informal review sessions.

Remember that your program will change over time as the needs of your organization or the surrounding community change. You should update your program's purpose and objectives, or even develop new ones, as needed.

CONCLUSION

A Workplace CERT program can offer many benefits, including augmenting existing response capabilities, increasing the general level of preparedness at your workplace, and fostering a culture that values and promotes safety. This document can help you get started on implementing an effective program. Building support for the program and establishing partnerships is probably the most fundamental step to starting a CERT, as strong support can make it easier to overcome many potential obstacles.

As you work through developing your program, reference <http://www.fema.gov/cert> and <http://www.ready.gov/business> for information, tools, and templates that can facilitate your efforts, and email cert@fema.dhs.gov with any questions. The materials available for the CERT Program Manager course (<http://www.fema.gov/community-emergency-response-teams/training-materials>) and the guide for starting and maintaining a CERT program (<http://www.fema.gov/start-and-maintain-community-emergency-response-team-program>) may be especially helpful.

FEMA welcomes feedback and stories about individual programs for the CERT E-Brief. Please send them to cert@fema.dhs.gov. Please also sign up to receive regular CERT updates, including the National CERT E-Brief and webinar announcements: <http://www.fema.gov/sign-community-emergency-response-team-updates>.

OTHER RESOURCES

Appendix A: Outreach Materials

The following documents are included in this section:

- Sample Recruitment Email
- Tips for Social Media and Online Messaging
- Phone Script Guide
- Sample CERT Business Case

Appendix B: Sample Forms and Templates

The following documents are included in this section:

- Conducting a Hazard Assessment Template
- Sample Business Plan Outline
- Managing Records and Data
- Sample After-Action Report

APPENDIX A: OUTREACH MATERIALS

SAMPLE RECRUITMENT EMAIL

This Sample Recruitment Email can be modified for your Workplace CERT program. As you reach out to employees, consider factors that will most effectively motivate them to participate in CERT training.

Subject Line: Get Prepared!

Would you know how to respond if you were the first person at the scene of an emergency?

If you are interested in being a leader in the workplace and learning skills you can use to help yourself and others during an emergency, we invite you to join our Mail Service Express Houston office Workplace Community Emergency Response Team (CERT).

Often, the first people to arrive at the scene of an emergency or disaster are not professional first responders—they're people like you and me. Learning a few basic skills can prepare you to assist yourself and those around you in the event of an emergency. With CERT training, you can be a leader in the workplace, as well as within your community.

We are currently recruiting volunteers for our Workplace CERT program. Because of CERT, Mail Service Express is a better-prepared and more resilient workplace. Participants will learn skills like disaster medical operations, light search and rescue, and fire safety.

If you are interested in learning disaster preparedness and response skills and helping to make our workplace more resilient, please attend our informational session on Wednesday, September 4 at 7:00 pm in the lobby.

Supervisors will provide approved time-off for employees interested in volunteering.

For additional questions, please feel free to contact the Workplace CERT program manager directly at CERT@MailServiceExpress.com or (555) 555-5555. You are also encouraged to visit our website at <http://www.MailServiceExpress.com/CERT> for more information about the program.

Al Smith
Workplace CERT Program Manager
Mail Service Express, Houston Office

TIPS FOR SOCIAL MEDIA AND ONLINE MESSAGING

With effective social media messaging and blogging, your Workplace CERT program can recruit new participants, sustain an active team, raise awareness, engage supporters, and even garner media attention. This document is intended to help you prepare online messaging for your program.

Blog Post Checklist and Sample Messaging

The checklist below provides instructions for what to consider when preparing Workplace CERT blog posts. Your blog should be tailored to fit your particular workplace needs. Keep the content on your blog fresh and relevant; regularly updated blog content and articles keep visitors coming back to your site.

Developing Your Blog Post

- Determine the topic and purpose of your post. Creating an editorial calendar may help organize content ideas for future blog posts. Examples might include:
 - Announcements
 - Celebrate successes
 - Funding/Resources
 - Membership engagement and appreciation
 - Partnership development
 - Recruitment
 - Sharing preparedness information
- Identify the potential audience(s) for the blog post and, when applicable, their interest in the program. Some potential audience(s) might include:
 - Community/External Supporters or Partners
 - Community/Local Professional Responders
 - Customers
 - Employees
 - Local Citizen Corps Council and/or CERT
 - Local Emergency Management Organizations
- Develop an eye-catching blog post title.
- Determine and develop key messages applicable to your audience(s).
- Include a call-to-action that drives the reader to take the next step. Examples include:
 - Visit the Workplace CERT program website
 - Contact the Workplace CERT program manager
 - Attend the next Workplace CERT meeting
 - Share the blog post with others
- Publish your post during a time when your audience is likely to read and/or relate to it. Examples include:

- In the beginning of the calendar year
- After a major disaster
- Before a major event, like an impending hurricane or large sporting event
- If possible, include a photo, image, or video.
- If the blog allows for comments, try to establish a dialogue with readers who comment on the post; answer any questions or comments they have about the post or the program. If the blog post does not allow comments, state that as a note at the end of the post.
- Include relevant contact information.

Sample Blog Post

A sample blog post on the following page can serve as a guide to assist you in writing your own post. Tailor the post to your purpose and audience. The sample below is an example of a recruitment post targeting employees.

There's a fire in the printer room.

Do you know how to use that fire extinguisher?

Disasters can happen anywhere. Would you know how to respond if you were the first person at the scene of an emergency? Learning a few basic skills can prepare you to assist yourself and those around you in the event of an emergency in the workplace, within your community, or at home.

For the past five years, our Houston office has provided valuable staff training through the Workplace Community Emergency Response Team (CERT) program.

What does our Workplace CERT do?

Helps prepare our workplace for a wide variety of incidents, ranging from natural disasters, to serious illness and pandemic incidents, acts of violence and terrorism, and incidents involving hazardous materials.

Provides hands-on training and covers skills such as fire safety, light search and rescue, team organization, disaster medical operations, and basic disaster preparedness.

Why does all of this matter?

As you know, our Houston, TX location serves more than 20,000 businesses and homes in the area. And on any given day, during core business hours our employees encounter more than 27,000 residents, business owners, and general citizens on delivery routes. That means that beyond the incidents that could occur within our home office, our employees are exposed to a number of people and potential disasters where response skills, like knowing how to perform basic disaster medical operations or how to use a fire extinguisher, are critical.

We want YOU to join our team:

We are currently recruiting volunteers for our CERT program. Because of our CERT, Mail Service Express is a better-prepared and more resilient workplace.

Supervisors will provide approved time-off for employees interested in volunteering.

For additional questions, please feel free to post in the comments section of the blog or contact the Workplace CERT program manager directly at CERT@MailServiceExpress.com or (555) 555-5555. You are also encouraged to visit our website at <http://www.MailServiceExpress.com/CERT> for more information about the program.

SOCIAL MEDIA TIPS AND SAMPLE MESSAGING

This section of the guide includes tips and sample messaging for use with social media. If you are new to social media, you should prioritize your efforts to focus on one or two platforms, like Facebook or Twitter. You should prioritize based on the specific platforms that already exist or are popular within your workplace or community.

Social Media Tips

- Check with your workplace Communications Department to determine if there are existing platforms you can use and identify in advance any guidelines or restrictions on use of social media.
- If you use platforms like Twitter or Facebook, consider creating a private account to enable communications with only approved members. If your workplace has existing social media platforms, you can use them for public-facing messages while maintaining a separate, private account for CERT volunteers.
- To help people find you when searching social media, try to consistently use a #hashtag, for example #WorkplaceCERT, in your posts or tweets. You may choose to get more specific with your hashtag, for example, #MailUSAWorkplaceCERT, but you should keep in mind that there may be character limitations, depending on the platform. It is generally accepted to use a number of hashtags in an individual post—for example #WorkplaceCERT #training #disasterdrill #communityresilience—to expand the reach of your post or tweet.
- When possible, include visuals and other types of media like infographics, photos, or videos in your posts. Some social media platforms like Facebook and Twitter can be linked to photo and video sites like Instagram or Vine.
- Include your Workplace CERT website or webpage address within your posts or tweets. If you have character limitations, consider a link shortening service.

Sample Twitter Messaging

Awareness

- Employees: Our #WorkplaceCERT enables our company to be more prepared and resilient. Learn more: <http://www.FEMA.gov/CERT>
- We have an enhanced capacity to respond to emergencies or disasters within our workplace. We have a #WorkplaceCERT. <http://www.FEMA.gov/CERT>
- Want to learn more about workplace resilience and preparedness? Learn about our #WorkplaceCERT by visiting our web page. <http://www.FEMA.gov/CERT>
- See our #WorkplaceCERT spring into action during an emergency! <http://www.FEMA.gov/CERT>

Recruitment

- ❑ Employees! Interested in disaster preparedness? Join our CERT & get trained to help others! #WorkplaceCERT. <http://www.FEMA.gov/CERT>
- ❑ We're encouraging employees to join #WorkplaceCERT. Learn disaster medical operations, disaster preparedness & more! <http://www.FEMA.gov/CERT>
- ❑ Learn fire safety, light search and rescue, teamwork, and more. Employees, join our #WorkplaceCERT today! <http://www.FEMA.gov/CERT>
- ❑ Our #WorkplaceCERT provides lifelong disaster preparedness skills. Employees: Learn more and join today! <http://www.FEMA.gov/CERT>
- ❑ Curious about those folks in green vests? Those are #WorkplaceCERT volunteers. All employees can join! <http://www.FEMA.gov/CERT>
- ❑ We are taking steps to prepare our workplace for emergencies & disasters. Employees, join us. #WorkplaceCERT <http://www.FEMA.gov/CERT>
- ❑ Training opportunities for employees interested in disaster preparedness! Join our #WorkplaceCERT! <http://www.FEMA.gov/CERT>
- ❑ Employees: be prepared to assist yourself and those around you in the event of an emergency. Join #WorkplaceCERT! <http://www.FEMA.gov/CERT>
- ❑ Employees: we're expanding opportunities for training in preparedness & response skills: #WorkplaceCERT. <http://www.FEMA.gov/CERT>
- ❑ Emergencies happen. CERT training can make a difference. Employees are encouraged to join today: #WorkplaceCERT. <http://www.FEMA.gov/CERT>

Sustainment

- ❑ Employees: It's volunteer appreciation week. Join fellow CERT volunteers for pizza in the conference room at noon! <http://www.FEMA.gov/CERT>
- ❑ Hurricane season is fast approaching. CERT volunteers: sign up and take a refresher course in Light Search & Rescue: <http://www.FEMA.gov/CERT>
- ❑ September is National Preparedness Month. Employees: join us at 6PM tonight in the lobby to learn about the activities we'll be showcasing!
- ❑ A big shout out to all 11 new and 25 current volunteers! Your dedication to our preparedness is appreciated! Go CERT! <http://www.FEMA.gov/CERT>

Sample Facebook Messaging

- ❑ Check out this video of a Workplace CERT volunteer using a fire extinguisher during an emergency on the production floor yesterday! Wow! <http://www.FEMA.gov/CERT>
- ❑ Fire safety, light search and rescue, teamwork, and more. Our Workplace CERT provides training and lifelong skills to our employees. Employees: join our Workplace CERT program today! <http://www.FEMA.gov/CERT>

- Employees: we want YOU to join our Workplace CERT program. Learn basic disaster preparedness, fire safety, basic medical operations, team organization, light search and rescue, and more! Click on the link to learn more about this volunteer opportunity and how you can support workplace preparedness and resiliency! <http://www.FEMA.gov/CERT>
- Curious about the colleagues you've seen around in the bright green vests? Take a look at some of these photos! Recognize some of your office-mates? These are our Workplace CERT volunteers. Employees: you can be one too. Learn more today! <http://www.FEMA.gov/CERT>
- Our Workplace CERT program provides valuable benefits, from augmenting existing response capabilities to increasing the general level of preparedness in our workplace. Our Workplace CERT is currently seeking employees to sign up. Please click the link to find out how you can join and boost your workplace preparedness! <http://www.FEMA.gov/CERT>
- Emergencies happen. Workplace CERT training can make a difference for you and those around you. We are expanding opportunities for training and real-world experience in preparedness & response skills. Employees: join our Workplace CERT today: <http://www.FEMA.gov/CERT>

WORKPLACE CERT PHONE SCRIPT GUIDE

This guide provides a checklist of items that should be considered or completed as you develop your Workplace CERT phone script. Having a phone script can help your efforts immensely when you are pitching one of your audiences. With topics ranging from membership recruitment to requests for funds, a phone script ensures you have all your key points written down ahead of time.

This document serves as a how-to, and your actual phone script(s) should be tailored to address your audience(s) and purpose. In many cases, the purpose of the call may be to introduce yourself and the program to your audience. This introduction may lead to a longer phone conversation, follow-up phone calls, and/or potentially an in-person meeting. Keep the specifics of your program and the purpose and goal(s) of your outreach effort in mind when planning your communications approach.

Phone Script Checklist

Use the checklist below to develop a phone script or tailored talking points, ahead of your call.

- Determine the purpose of your call (What is your primary “ask”?)
 - Donation of funding, supplies, or equipment
 - Membership recruitment
 - Support for your program from internal leadership, community organizations, potential partners, etc.
- Identify your potential audience(s). Some potential audience(s) might include:
 - Community/external supporters or partners
 - Community/local emergency managers and professional responders
 - Company leadership
 - Employees
 - Local Citizen Corps Council and/or CERT
 - Other
- If possible, research the person(s) you are calling and identify their full name, title/rank, and other publicly available background information. This background information can help you identify their motivators and concerns so you can further tailor your pitch.
- Schedule a time to speak with each contact.

Developing Your Script

- Determine possible motivations for your contact to support the CERT program.
- Be sure to include points that address the interests and motivators of the contact in the phone script.
- Anticipate questions and concerns from your contact and prepare responses before the phone call.

- Be sure to also include relevant data about the program, including:
 - A brief overview of the program
 - Call-to-Action (What do you want them to do? For example, visiting a website, attending a meeting, or filling out an application)

Phone Script Outline

Before writing out your phone script, it can be helpful to develop an outline of key points that you want to address. Provided below is an outline of a sample script, which is developed into a full script in the following section.

- Greeting
- CERT overview (What is CERT?)
- Key point 1 (Why do we have a Workplace CERT?)
- Key point 2: (What do our CERT volunteers do?)
- Key point 3: (Why is our Workplace CERT important to the community?)
- Your ask: (What do we want them to do? Highlight the motivators and incentives.)
- Contact information: (How can they follow up with us?)
- Close

Sample Phone Script

Below is a sample phone script. This sample phone script depicts what a program manager might say to a potential community partner. You are welcome to use this pitch as a guide, however, be sure to tailor the script to meet your needs. *Be sure to ask in the beginning of the call if you're speaking to the correct person, and if not, ask to be directed to the person to which you should be speaking.*

Hi, my name is Mary and I am the Program Manager of the Mail Service Express Houston location Community Emergency Response Team (CERT) program. Are you the appropriate person to speak with about community involvement? *<If the answer is no, ask to be transferred to the correct person and thank them for their time.>* Thank you for taking the time to speak with me today about our Workplace CERT program.

Our Houston, TX location serves more than 20,000 businesses and homes in the area. And on any given day, during core business hours our employees encounter more than 27,000 residents, business owners, and general citizens on delivery routes. What you might not know is that for every 1,000 people within our county, we only have one emergency services responder. That means that in the event of a disaster, first responders would be able to reach only a limited number of people, and it's up to people like you and me to assist ourselves and those around us.

CERT training can provide a few basic skills that can prepare our employees to help themselves and those around them in the event of an emergency at one of our distribution centers or during a delivery route. Our Workplace CERT program educates and trains volunteers in disaster preparedness and empowers participants to take more active roles within the workplace and community by supporting emergency responders during and after an emergency such as acts of violence and terrorism, or incidents involving hazardous materials.

This program can also help our employees and the larger community recover more quickly from a disaster and reduce the impact of a disaster within the community, such as by assisting with evacuation procedures to get people to safety, or providing immediate, basic medical response until professional responders arrive.

Because of our CERT, our community is better prepared and more resilient.

Mail Service Express is currently seeking opportunities to partner with local organizations to help support our CERT program. I'd like to invite you to please attend our informational session on Wednesday, September 4 at 7:00 pm at Town Hall.

Do you have any questions about the program or partnership opportunities that I might be able to answer right now?

Please feel free to contact me directly at CERT@MailServiceExpress.com or call me at (555) 555-5555. I also encourage you to visit our website at <http://www.MailServiceExpress.com/CERT> for more information about the program.

Thank you again for your time and attention, and I hope to see you at the next meeting. In the meantime, if you have any questions, please don't hesitate to reach out to me. Have a good night.

SAMPLE CERT BUSINESS CASE

Invest in Workplace CERT

Preparedness Makes Good Business Sense

- *Every dollar spent on preparing for a disaster saves seven dollars in response.*
- *At least 25 percent of businesses that close after disasters never reopen.*
- *The disaster survival rate for companies without a business continuity plan is less than 10 percent.*

A prepared workplace is a more resilient workplace, providing a faster return to normal operations and lessening potential financial impacts from a disaster. Economists calculate every dollar spent on preparing for a disaster saves seven dollars in response.ⁱ At least 25 percent of businesses that close after disasters never reopen.ⁱⁱ And the disaster survival rate for companies without a business continuity plan is less than 10 percent.ⁱⁱⁱ

Disasters and emergencies can occur during working hours and interrupt business operations. Preparing employees with the knowledge and skills to recognize hazards and respond appropriately is of critical importance and can limit injury, loss of life, and property damage in the event of an emergency.

Workplace CERT: Building a Responsible, Prepared, Resilient Business

Employee preparedness is a core component of business continuity; individual employees that are prepared can return to work more quickly. Workplace Community Emergency Response Team (CERT) is an opportunity to enhance individual preparedness and support organizational resilience. CERT is a nationally supported, locally implemented program that educates the public on what to do before, during, and after a disaster to protect themselves and assist others until professional help arrives.

Workplace CERT is the application of the CERT program in a business environment. Workplace CERT provides skills that enable employees to assist co-workers, customers, and guests in an emergency. Workplace CERT is appropriate for any type of workplace, including for-profit, nonprofit, faith-based, and government organizations. Workplace CERT supports a culture of safety and preparedness by training employees to recognize and correct hazards in their environments. It empowers employees to take action in the event of an emergency. Trained volunteers can assist with functions like evacuation procedures or provide immediate, basic medical assistance.

Key Components of CERT Training

CERT is flexible and can be tailored to an organization's unique features. Businesses can scale and customize training sessions based on company needs and employee schedules. Workplace CERT training meets some Occupational Safety and Health Administration (OSHA) training requirements and may fit into existing employee training programs or organizational emergency plans.

CERT training includes the following topic areas:

- Personal Preparedness
- Fire Safety and Suppression
- Basic Medical Operations
- Psychological First Aid
- Team Organization
- Light Search and Rescue

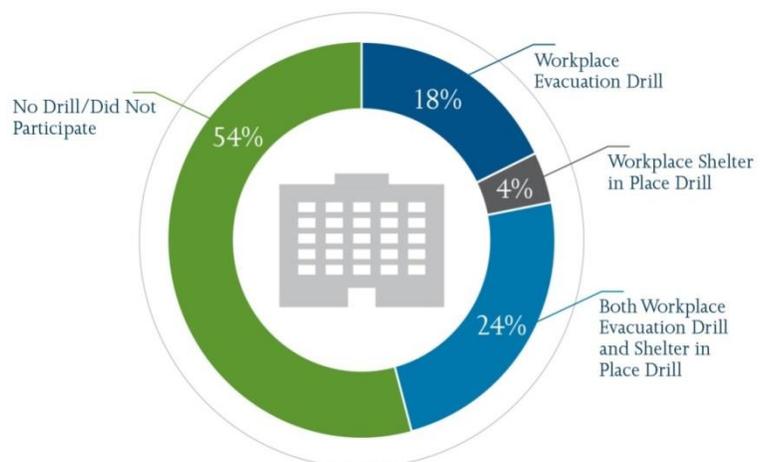
These elements can be supplemented with specific training components relative to an organization's operations and needs.

Importance of Employee Preparedness

The workplace is one of the most effective channels through which to encourage individual and family preparedness. Research shows that people who receive preparedness information and/or participate in drills at their workplace are more likely to be prepared at home. ^{iv}

Data from FEMA's Preparedness in America report indicate a positive relationship between employment status and emergency preparedness. The data also reveals a critical need to increase personal and workplace preparedness training. Workplace CERT is a cost-effective method for delivering employee training.

National Participation in Workplace Drills



Preparedness in America, FEMA2013

Community Relationships

For organizations with a large public-facing component, CERT can enhance interactions with the community in the event of an emergency by ensuring employees have the knowledge and skills to act quickly. Envision a driver, sales associate, or customer service representative helping to search for survivors while on duty in an area impacted by a tornado. By giving them the skills to assist, Workplace CERT can strengthen the brand and public image of any organization.

Resilience is the responsibility of the whole community. Workplace CERT can build and sustain meaningful relationships with community leaders, first responders, emergency management staff, non-profit, faith-based, and community organizations by providing meaningful opportunities to work together. A Workplace CERT program demonstrates the commitment of an agency to its employees and customers as well as the community they share.

Additional Resources

As you begin to develop your Workplace CERT program, please refer to www.fema.gov/cert for additional information, tools, and templates. You can also email cert@dhs.gov with any questions.

To learn more about actions you can take to build preparedness in your organization, visit the American Red Cross Ready Rating program at www.readyrating.org.

ⁱ Stephen Flynn, *The Edge of Disaster: Rebuilding a Resilient Nation* (New York: Random House Publishing Group, 2007).

ⁱⁱ National Flood Insurance Program, "Commercial Coverage," accessed June 19, 2014, www.floodsmart.gov/floodsmart/pages/commercial_coverage/cc_overview.jsp

ⁱⁱⁱ "Disaster Recovery Planning," *Continuity Central*, last modified April 24, 2009, <http://www.continuitycentral.com/feature0660.html>.

^{iv} FEMA. Preparedness in America: Research Insights to Increase Individual, Organizational and Community Action. 2013.

APPENDIX B: SAMPLE FORMS AND TEMPLATES

CONDUCTING A HAZARDS ASSESSMENT TEMPLATE

Effective planning is based on a consistent analysis and comparison of threats and hazards likely to affect a particular area. If a hazard assessment has not been conducted for your facility, you can use the methodology below to conduct your own assessment.

Hazard Assessment Process

There are numerous tools and resources available to assist you in conducting a threat and hazard assessment. The method described below is based on guidance provided in FEMA's *Threat and Hazard Identification and Risk Assessment Guide Comprehensive Preparedness Guide [CPG]201*.^v

Identify Threats and Hazards

The first step in conducting a hazard assessment is to gather information about the types of threats and hazards faced by your facility. This information can be obtained through a combination of first-hand knowledge and experiences, research, and outreach to local response agencies such as emergency management offices, fire and police departments, and non-profit agencies like the American Red Cross. The *Hazards and Threats* table on page four of this document provides sample hazards and threats.

Assess the Risk

After identifying the threats and hazards in your area, the next step is to compare threats/hazards against one another and assess the potential impact and level of risk for each threat/hazard. Then, assign a risk value to each hazard, relative to all other hazards. A frequently used and effective method for organizing the information about each potential threat and hazard is to create a table with a range of information including:

- Probability or frequency of occurrence
- Magnitude
- Time available to warn staff and visitors
- Duration
- Follow-on and cascading effects of threat or hazard

When completed, the table looks like the sample on the next page. To complete the analysis, think about the potential effects of each scenario and select the appropriate level of impact for each of the following categories: probability, magnitude, warning, and duration. Analysis can be strengthened by inviting other experts from within your organization to participate and either averaging individual scores or completing the table as a group.

Threat and Hazard Assessment Table

Threat / Hazard	Probability	Magnitude	Warning	Duration	Risk Priority
Fire	4. Highly likely 3. Likely 2. Possible 1. Unlikely	4. Catastrophic 3. Critical 2. Limited 1. Negligible	4. Minimal 3. 6–12 hrs. 2. 12–24 hrs. 1. 24+ hrs.	4. 12+ hrs. 3. 6–12 hrs. 2. 3–6 hrs. 1. < 3 Hours	High Medium Low
Hazmat spill	4. Highly likely 3. Likely 2. Possible 1. Unlikely	4. Catastrophic 3. Critical 2. Limited 1. Negligible	4. Minimal 3. 6–12 hrs. 2. 12–24 hrs. 1. 24+ hrs.	4. 12+ hrs. 3. 6–12 hrs. 2. 3–6 hrs. 1. < 3 Hours	High Medium Low

After completing the table, you need to prioritize the risk associated with each threat/hazard so you can compare them to one another and identify your top priorities. This is often done by assigning a numeric value to each component of the risk (1, 2, 3, or 4, in the sample table). For example, consider a fire in the workplace.

Sample Assessment- Fire in the Workplace

Threat / Hazard	Probability	Magnitude	Warning	Duration	Risk Priority
Fire	4. Highly likely 3. Likely 2. Possible 1. Unlikely	4. Catastrophic 3. Critical 2. Limited 1. Negligible	4. Minimal 3. 6–12 hrs. 2. 12–24 hrs. 1. 24+ hrs.	4. 12+ hrs. 3. 6–12 hrs. 2. 3–6 hrs. 1. < 3 Hours	High Medium Low

You may determine that it is Likely (value of 3) that your workplace will experience a moderately large fire, meaning something bigger than a microwave fire but smaller than a large fire that engulfs the entire office space or facility. If such a fire were to occur, it would have a Critical (value of 3) impact on your facility, perhaps impacting production or the provision of services and limiting communication. In the event of a fire, you would likely have Minimal (value of 4) warning. Response to a moderate fire could impact your workplace for 6-12 Hours (value of 3), meaning it may take 6-12 hours for resumption of normal services.

If this assessment were being scored, you would have scored a fire at 13 (3+3+4+3=13) out of a potential 16 points. Depending on the final scores of all other threats and hazards, this would likely be a Medium or High Risk Priority. Based on this information, you might determine that building CERT fire response capabilities is a moderate or high priority for your workplace.

^v Available at <http://www.fema.gov/media-library/assets/documents/26335>

SAMPLE BUSINESS PLAN

A Business Plan can help you document the vision for and benefits of Workplace CERT for presentation to senior leadership and other internal partners. It can be a powerful tool for building support for the program within the organization. A sample outline is suggested below.

- Background
 - Summary of hazard analysis
 - Summary of current response capabilities (internal and external)
 - Planning assumptions, if applicable
- Program Overview (Products and Services, Market)
 - Purpose, goals, and objectives for the Workplace CERT
 - Analysis of how CERT meets gaps within the organization
 - Other benefits to the organization, alignment with mission, and values and goals
- Operations (Management, Operations Plans)
 - Structure, including an organizational chart if appropriate
 - Identify participants and participant requirements
 - Identify reporting structure
 - Identify organization style; teams or volunteer pool
 - Identify how the team activates and operates during activation
 - Training, Drills, and Exercises
 - Required training and minimum participation requirements
 - Additional trainings offered
 - Sample annual training plan
- Resource Requirements
 - Personnel
 - Program Manager
 - Instructors
 - Facilities
 - Storage space and training space
 - Equipment and supplies
 - Additional funds for volunteer recognition, marketing materials, etc.
- Challenges
 - Identify any risks or challenges to the program and how they will be addressed
- Schedule of Implementation
 - Identify a timeline for year one along with expected milestones
 - Identify evaluation methods used to track progress
- Conclusion

MANAGING RECORDS AND DATA

Effective data and records management is critical to the success of any Workplace CERT program. There are several types of data that program managers should consider maintaining, including volunteer contact information, training and exercise records, instructor contact information, and programmatic evaluations. A spreadsheet, a document, or a hard copy filing system may be used to ensure that information is thorough and current. This document contains tips on how to set up and sustain a system to manage data as well as a detailed example of a volunteer database.

Maintaining Personal Information

Prior to collecting and maintaining any personal information, check with your human resources and/or legal departments regarding existing policies and procedures for your workplace. Limit the information you collect to only what you need to know in order to operate the program. Coordinate your records collection with the human resources department to limit duplication of systems containing personal information. Ensure records are secured at all times and access is limited to select individuals with a clear need to know. For transparency, when collecting data, be prepared to share with volunteers how you will use, store, and secure their data.

Redundant Systems

As CERT is designed to operate during emergencies, it is essential to maintain a records system that you can access under adverse conditions, including loss of power or operation at an alternate site. When developing your records system, build several 'back-ups' into your data storage plan, such as maintaining updated paper copies of critical contact information or backing up critical files on a portable flash drive or hard drive. There are numerous high-tech and low-tech ways to ensure you are able to access your critical information at all times.

Types of Records

There are several types of records you should maintain for your Workplace CERT program. Accurate records are essential to demonstrating cost effectiveness and programmatic success over time. Here are some suggestions regarding types of records your program should maintain:

- Activation Records (activation request, date, time, location, activated volunteers, notes/forms, after action report, etc.)
- Equipment Records (current inventory, date of inspection, expiration date, location, etc.)
- Evaluation Records (program evaluations, course evaluations, instructor evaluations, etc.)

- Instructor Records (name, contact information, training dates, reviews, etc.)
- Volunteer Records (name, contact information, trainings completed, special skills, applications, etc.)
- Purchasing Records (date of purchase, vendor, price/unit, total cost, etc.)
- Training Records (date, time, location, attendees, instructors, evaluations, etc.)

In addition to the records suggested here, your program may require additional records based on your specific operations. When developing your records management system, consider ways to consolidate information into the fewest possible databases to limit the amount of time required for updates.

Scheduled Updates

When managing information, it can be helpful to schedule periodic reviews of your current records and systems. Data entry is an easy task to postpone; schedule time on your calendar after a CERT class or on a regular basis to update your records.

Developing a Roster

The team roster is the most basic and essential record for any Workplace CERT program. The guidance below provides a suggested outline for creating your roster in a spreadsheet that can be used to track contact information, team assignment, training, and specialized skills. The specific content in your roster depends on the particulars of your program and you should modify your roster accordingly. At least once or twice a year, you should test your contact information records to ensure they remain valid. You could use a call-down drill to engage volunteers while testing communications systems and accuracy of contact information.

Roster Outline

Using a single workbook with multiple tabs, you can track critical information in a consolidated format.

Spreadsheet Tabs	Cell Content
Administrative Information	- Basic administration information including: contact information, department/division, location, supervisor contact information, emergency contact information, t-shirt size, etc.
Training Records	- Information on trainings completed, which could include training dates, mandatory and optional trainings, etc.

List of Skills	- Information on volunteers' specialized skills such as radio operations, CPR/AED certification, etc.
Team Assignments	- Information on volunteers' assigned roles within the team; if you have multiple teams, full team rosters, etc.
Equipment	- If equipment is distributed, type of equipment, date assigned, date returned, etc.

Sample Roster Structure

Provided on the following pages is a sample structure for a roster. In the example provided, some identifying information—in this case, last name and first name—is repeated on every tab to ensure that information is properly attributed to each team member across all tabs. There are alternate ways to identify each volunteer, such as an employee ID or other number, which you could choose to use instead of last name and first name. There are tables to identify the content recommended for each section of the roster and a visual example of what that section looks like in a spreadsheet format.

Tab 1: Administrative Information

Instructions

In this tab, record basic information such as contact information, location, phone number, etc. Ensure you collect and record multiple ways to contact your volunteers. The chart to the right provides examples of the types of data that you could collect and store in the roster under the administrative tab.

Personal Information	Last name
	First name
	Position/Job description
	Location
	Supervisor
	T-shirt size (if making this available)
Contact Information	Phone number (work)
	Phone number (cell)
	Phone number (home)
	Email address
Supervisor Contact Information	Phone number (work)
	Phone number (cell)
Emergency Information	Email address
	Emergency contact name
	Emergency contact phone number

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Personal Information						Contact Information				Supervisor Contact Information			Emergency Information	
2	Last Name	First Name	Position/Job Description	Location	Supervisor	T-shirt size	Phone number (work)	Phone number (cell)	Phone number (home)	Email address	Phone number (work)	Phone number (cell)	Email address	Emergency contact name	Emergency contact phone number
3	Active Team Members														
4															
5															
6															
7															
8	Inactive Team Members														
9															
10															
11															
12															
13															
14															
15															
16															
17															
18															

Tab 2: Training

Instructions

In this tab, record information related to training and exercises completed, such as date completed, date refresher is

This tab can also be used to record participation in other non-activation related CERT activities such as safety fairs, outreach events, etc. Trainings and licenses/certifications that

may be required by individual roles have been color-coded to provide greater clarity.

Required Training	CERT Basic Training
	IS-100.b
	IS-700.a
CERT Supplemental	Animal Response (1 & 2)
	Emergency Communications
	Tools for Leadership Success
	Traffic and Crowd Management
	Flood Response
Licenses and	Firefighter Rehab
	CPR/AED (Date Completed/Certification Expiration Date)
	First Aid (Date Completed/Certification Expiration Date)
CERT Exercises	Ham Radio (Date Completed/Certification Expiration Date)
	CERT exercises completed

	A	B	C				D				E				F				G				H				I				J				K				L				M				N				O				P				Q				R				S				T				U				V				W				X			
1	Personal Information		Required Trainings (Enter the date completed)				CERT Supplemental Trainings (Enter the date completed)												Additional Trainings (Enter the date completed)				Licenses and Certifications						CERT Exercises Completed (Y/N)																																																													
2	Last Name	First Name	CERT Basic Training	IS-100.b	IS-700.a	IS-200.b	Animal Response 1	Animal Response 2	Emergency Communications	Tools for Leadership Success	Traffic and Crowd Management	Flood Response	Firefighter Rehab	Exercise Swaps	Driver Safety Training	CPR		First Aid		Ham Radio		11/1/13	12/5/13	1/17/14																																																																		
3																Date Training Completed	Certification Expiration Date	Date Training Completed	Certification Expiration Date	License Class	License Expiration Date																																																																					
4	Active Team Members																																																																																									
5	Sample: CERT Member: Driver																																																																																									
6	Sample: CERT Member: Production Staff																																																																																									
7	Sample: CERT Member: Customer Service Staff																																																																																									
8	Sample: Supervisor																																																																																									
9																																																																																										
10																																																																																										
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14	Inactive Team Members																																																																																									
15																																																																																										
16																																																																																										
17	Shading/color-coding indicates that a training or license/certification is required for a particular role.																																																																																									
18																																																																																										
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Tab 3: Skills

Instructions

In this tab, record the skills and, when applicable, years of experience in each skill for your volunteers. Experience can come from CERT, workplace experience, or academic training. You may also choose to include a notes section to capture qualitative evaluation, and identifying how skills were assessed and by whom, such as feedback from an instructor or team leader.

Skills

Medical Response
Search and Rescue
Fire Suppression
Ham Radio Operator
Organization
Team Leadership
Communications
Public Relations
External/Partner Coordination
Fundraising/Resource Development
Technology
Program Evaluation
Administrative

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
1	Personal Information		Skills (When applicable, identify the number of years of experience in each skill area. Experience can come from CERT, workplace experience, or academic training.)												
2	Last Name	First Name	Medical Response	Search and Rescue	Fire Suppression	Ham Radio	Organization	Team Leadership	Communication	Public Relations	External / Partner Coordination	Fundraising / Resource Development	Technology	Program Evaluation	Administrative
3	Active Team Members														
4															
5															
6															
7															
8	Inactive Team Members														
9															
10															
11															
12															
13															
14															
15															
16															
17															

Tab 4: Team Assignment

Instructions

In this tab, record the assignment of each volunteer. This may result in the development of individual rosters for sub-teams, if you have them. If applicable, you may choose to add a notes section containing justification for the team assignment, which may include feedback from an instructor or team leader, expressed preferences of the volunteer, or other relevant information.

	A	B	C	D	E	F	G	H
1	Personal Information		Team Assignment					
2	Last Name	First Name	CERT role	CERT team	CERT team leader			
3	Active Team Members							
4								
5								
6								
7								
8	Inactive Team Members							
9								
10								
11								
12								
13								

Tab 5: Equipment

<p>Instructions</p> <p>In this tab, record any equipment that has been assigned to individual volunteers.</p>	Equipment Issued	Personal Protective Equipment (PPE)
		CERT Kit
		Radio
		Toolbox
		Search and Rescue Supplies
		Medical Supplies
	Equipment Checks	Record date of equipment checks
Date of Return	Record the date and condition of returned equipment.	

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O		
1	Personal Information		Equipment Issued												Equipment Checks Completed		Date Equipment Returned
2	Last Name	First Name	Personal Protective Equipment	CERT Kit	Radio	Toolbox	Search and Rescue Supplies	Medical Supplies	Jan-14	Jun-14	Jan-15	Jun-15	Jan-16	Jun-16			
3	Active Team Members																
4																	
5																	
6																	
7																	
8	Inactive Team Members																
9																	
10																	
11																	
12																	
13																	
14																	
15																	
16																	

SAMPLE AFTER ACTION REPORT

[INSERT EVENT LOGO]

[EVENT NAME]

[EVENT DATES]

**AFTER ACTION
REPORT/IMPROVEMENT PLAN**

[REPORT DATE]

[INSERT ORGANIZATION LOGO]



Administrative Handling

- 1) The title of this document is **Event Name** After Action Report and Improvement Plan.
- 2) This document is for INTERNAL USE ONLY and should not be distributed outside the organization without the explicit permission of **Title of Authorizing Individual**. Reproduction of this document, in whole or in part, requires the written consent of **Organization**.
- 3) **Point of Contact:**

Executive Summary

[Insert a description of the event, including background on the event/incident, an overview of CERT objectives, the purpose of this after action report and any other general information. This section is usually not longer than 1-2 pages.]

Sample Language

Jonestown Soars is a 501(c)(3) non-profit organization dedicated to promoting aviation and honoring aviation history. The organization hosts the popular annual Jonestown Aviation Exposition and Air Show at Jonestown Airport, featuring a variety of contemporary and vintage aircraft from both civilian and military aviation. The family-friendly event provides an opportunity to learn about flying, aircraft, and the important role of military aviation, while meeting local pilots and getting a close-up view of their aircraft, many of which have been painstakingly restored to their original condition from the mid-1900s.

For the 2013 Jonestown Air Show (JAS), CERT provided a fully staffed first aid station and community outreach booth. During the two-day event, nearly CERT volunteers provided 150 hours of volunteer service. Overall, the first aid tent provided care to 25 patients.

The JAS provided an ideal opportunity for volunteers to train and exercise first aid station deployment. Volunteers were expected to meet the following objectives:

1. *Deploy the first aid station including proper set-up and tear down.*
2. *Communicate effectively with all responders present including Jonestown Emergency Management Agency, Smith County Sheriff's Department, City of Jonestown Fire Department, and JAS staff and volunteers.*
3. *Provide adequate first aid care to those in need throughout the course of the event.*
4. *Support overall event needs including reception/greeting, information, and directing attendees.*
5. *Demonstrate effective teamwork between CERT and other first responders.*

The purpose of this report is to analyze the event results, identify strengths to be maintained and built upon, identify potential areas for further improvement, and support the development of corrective actions.

Major Strengths

[Insert a short description of each major strength identified by the team during debriefing.]

Sample Language

The major strengths identified during this event are as follows:

- *First Aid Station team demonstrated thorough knowledge of proper first aid station deployment. Team Leader effectively directed the operation of set-up and tear-down, accounting for all equipment.*
- *First Aid Station team members were well briefed by the Team Leader.*
- *Team Leader received and monitored an incident radio on the Law Enforcement frequency; Team Leader effectively utilized radio and used appropriate radio protocols.*
- *First Aid Station team members responded appropriately and effectively to all medical needs presented, according to their scope of practice.*
- *Volunteers worked very effectively together.*
- *Team Leader coordinated and worked closely with event organizers and staff.*
- *Event records were maintained using the Smith County Emergency Management accountability system; all volunteers were tracked from check-in to check-out.*

Areas for Improvement

[Insert a short description of each area for improvement identified by the team during debriefing.]

Sample Language

Throughout the event, several opportunities for improvement were identified, including:

- *Not all event volunteers were aware of the protocol for handling medical needs as outlined in the Incident Command System (ICS) 204 included with the Incident Action Plan. This resulted in a minor incident involving a “medical emergency” that was, in fact, a bee-sting in a small child with no allergies.*
- *Communication between the Fire Department’s Medical Unit Leader and the First Aid Station Team Leader needs to be improved; Team Leader did not attend the daily briefings and did not receive all the event information on the first day of the event.*

- *On Sunday, the busiest day of the event, CERT volunteers could have been utilized elsewhere to support overall event operations. Future planning could include an expanded role for CERT if requested. Appropriate areas to expand include reception, traffic control/parking, general information, and logistics/support.*
- *CERT volunteers did not receive proper wristbands and parking permits. In the future, further follow-up may be required with the JAS Volunteer Coordinator.*
- *Overall, the event did not have adequate changing stations and/or private areas for nursing mothers. This may be an area CERT can assist with in the future.*

Narrative

[Insert a narrative description of the event and activities that transpired. This should expand upon the executive summary and describe operations in greater detail.

Depending on the size of the event, this section may be 3-5 pages.]

Sample Language

Overall, the First Aid Station set-up and staffed by CERT volunteers during JAS was very successful. The Team Leader conducted a very thorough briefing with the event organizers, gained detailed situational awareness, and provided guidance during the event to volunteers. Each team member working the First Aid Station understood their roles, and preformed them accordingly during the administering of first aid. Proactive measures were also implemented by the Team Leader; during the event small groups of volunteers were directed to walk the grounds providing mobile first aid. Volunteers remained professional and did an excellent job serving the community.

There were no major medical emergencies during the event. However, a miscommunication did result in a perceived emergency when a young girl suffered a bee-sting. The initial radio call reported that the victim was in shock, which resulted in a rapid response from law enforcement personnel, emergency management, and First Aid Station team members searching for a victim in shock/non-responsive. During the search, the patient presented at the First Aid Tent, which was in the line of sight from the radio call's origin. Fortunately, she appeared to have only a minor reaction and was not allergic or in shock. After further investigation, it was discovered that the reception volunteers were not aware of the protocol for handling medical incidents during the event.

During this two-day event, CERT volunteers provided basic first aid to 25 patients at the station. During the treatment of these patients it was evident that volunteers followed their training protocols, fulfilled their roles and responsibilities, and worked effectively as a team. The proper set up of the first aid station, along with having all the necessary first aid supplies and equipment, enhanced the success of the treatment of these patients.

In the future, continuous efforts will be made to include CERT Team Leaders in the pre-event planning meetings held by the event organizer. During these pre-event meetings, the CERT Team Leaders will provide the capabilities and capacity of the first aid station, along with policies, protocols, and expectations regarding communications for the event. This measure ensures all emergency personnel working or volunteering for the event will clearly understand how to communicate and request assistance from the First Aid Station. If the Team Leader recognizes, or is alerted that the event organizers are having difficulties in providing adequate personnel to handle certain tasks such as parking, crowd control, or reception areas, they will notify Incident Command of the availability of CERT volunteers to perform these tasks. Through enhanced pre-event planning, continuous learning, and future training and exercises, CERT will continue to strengthen its programs and improve the valuable services provided to the community.

Event Synopsis

[Insert key information in each of the blank spaces below to capture event details.]

Event Name:

Type of Event:

Event Start Date:

Event End Date:

Duration:

Location:

Sponsor:

Program(s):

Mission:

Capabilities:

Event Planning Team:

Team Leader:

Participating Organizations:

Number of Participants: