Finance Unit

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| **Reports to:** | EOC Manager |
| **Finance Unit Leader Position Overview** | |
| *The Finance Unit Leader is responsible for ensuring all actions taken by the EOC are fiscally tracked and following appropriate procedures.* | |

# Summary of Responsibilities

1. Ensure that all financial records are maintained throughout the event or disaster.
2. Demonstrate knowledge of jurisdictional/organizational procurement policies:
   * Standard operations
   * Emergency operations
   * Cost-tracking processes and requirements:
     + Preapproved vendors
     + On-call contracts Determine purchase order limits for the procurement function in the Logistics Support Unit.
3. Ensure that all recovery documentation is accurately maintained during the response and submitted on the appropriate forms to the Federal Emergency Management Agency (FEMA) and/or the Governors Office of Emergency Services, if necessary.
4. Document actions and decisions on a continual basis.

# Activation Phase

* Sign in and ensure that all other EOC staff do the same.
* Maintain your activity log, which chronologically describes your actions taken during your shift.
* Obtain briefing from EOC Manager and previous shift (if applicable).
* Communicate procurement policies and procedures to EOC staff based on relevant laws and guidance from agency leadership.
* Check in with the Resource Unit/Planning Chief (in Planning Section) upon arrival and obtain your JASKIT.
* Report to and obtain briefing from Incident Commander.
* Set up your workstation, review your position responsibilities, and determine your resource needs.
* Establish and maintain a position log which chronologically describes your actions taken during your shift.
* Ensure that the Finance Section is set up properly and that appropriate personnel, equipment, and supplies are in place.
* Meet with the Logistics Chief and review financial requirements and procedures; determine the level of purchasing authority to be delegated to Logistics Section.
* Meet with all Unit Leaders and ensure that responsibilities are clearly understood.
* In conjunction with Unit Leaders, determine the initial Incident Action Plan objectives for the first operational period.

# Operational Phase

* Ensure that Finance position logs and other necessary files are maintained.
* Participate in all Incident Action Plan meetings.
* Keep the EOC Manager, EOC Staff, and elected officials aware of the current fiscal situation and other related matters, on an on-going basis.
* Review resource requests with Logistics Support personnel to verify understanding of request and provide input on course of action.
* Suggest cost-efficient alternatives to obtaining requested resources, as appropriate.
* Ensure that the Admin Unit receives copies and maintains all financial records throughout the event or disaster.
* Communicate fiscal burn rate and situational awareness information to EOC personnel, as appropriate.
* Ensure that the all EOC Staff are tracking time and utilizing sign-in/out documents.
* In coordination with the Logistics Support Unit, process purchase orders and develop contracts in a timely manner.
* Ensure that all recovery documentation is accurately maintained during the response and submitted on the appropriate forms to the Federal Emergency Management Agency (FEMA) and/or the Governors Office of Emergency Services, if necessary.
* Maintain Activity Log.
* Prepare for transition to Recovery Phase.

# Demobilization Phase

* Deactivate your assigned position and close out logs when authorized by the EOC Manager.
* Ensure that any open actions not yet completed will be handled after demobilization.
* Deactivate the EOC at the designated time, as appropriate.
* Complete all required forms, reports, and other documentation. All forms should be submitted to the Admin Unit prior to your departure.
* Be prepared to provide input to the after-action report.
* If another person is relieving you, ensure they are thoroughly briefed before you leave your workstation.
* Clean up your work area before you leave.

# Relevant Forms/References:

* Local Emergency Management Plan (LEMP)
* Local contracts and MOUs/MOAs
* Activity Log (ICS Form 214)
* Status Board (display of updates and key information)