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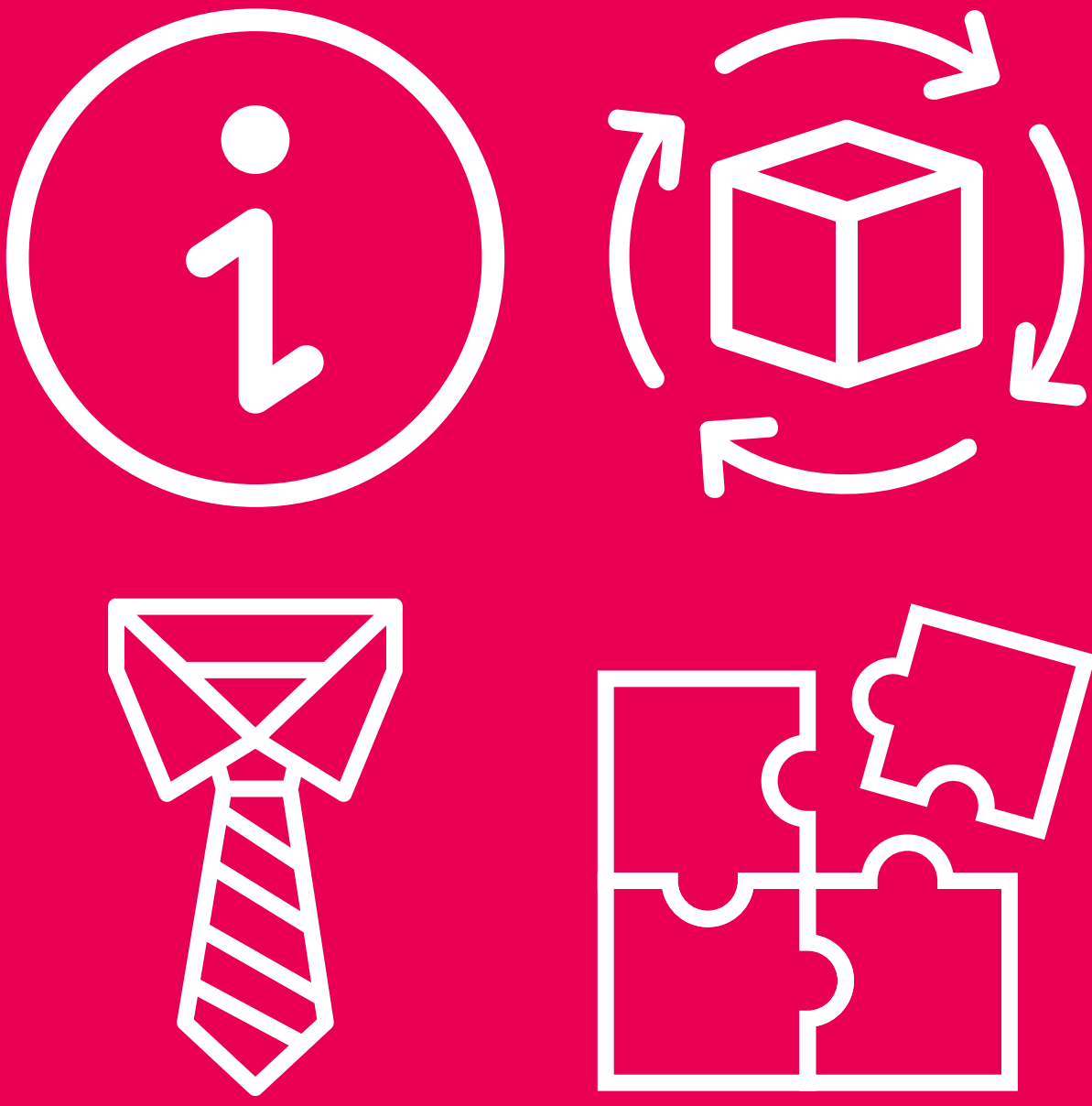
Guide to Advanced Resource Management Planning



What is resource management?

In this age of escalating crises and finite assets, entities must get serious about how they manage their resources. That's where resource management comes in. But what is resource management, exactly?

Well, as the name suggests, resource management is the organizational function dedicated to coordinating and overseeing tools, processes, and systems that help provide incident managers with appropriate resources in an appropriate timeframe during a crisis.

Resources, here, include any of the following:

- Equipment or assets
- People (both staff and volunteers), inclusive of the
  - Special expertise they might have
  - Information about threats or hazards they might bring
- Communications and warning technologies, including fire protection and life safety systems
- Materials and supplies
- Funding
- Facilities

Of course, resource management in the public safety context is more than just collecting and cataloguing assets to ensure they are available during a critical event. Effective resource management, under the frameworks developed by the National Incident Management System (NIMS)[i], can only happen if the following criteria are met:

- A consistent method for identifying, acquiring, allocating, and tracking resources is established
- Standardized systems for classifying resources to improve the effectiveness of mutual aid assistance agreements are developed
- Coordination to facilitate the integration of resources for mutual benefit is achieved
- Available resources from all levels of government, nongovernmental organizations, and the private sector are used, where appropriate
- Communications and information management elements are integrated into organizations, processes, technologies, and decision support
- Credentialing criteria are used that ensure consistent training, licensing, and certification standards[ii]

Shifts in NIMS guidance since 2021

Of course, these NIMS Guidelines have shifted in recent years. And so, this guide will lay out what was added in NIMS Guideline for Resource Management Preparedness, to provide a series of advanced resource management planning best practices[iii].

Published in 2021, these guidelines provide additional details on resource management preparedness processes, best practices, authorities, and tools. The activities detailed tend to pertain to shareable resources that can be deployable between organizations and jurisdictions.

However, for private entities, the guidelines are still relevant for implementing a comprehensive resource management process to align resource capabilities and terminology, streamline resource coordination, and ensure interoperability.

As mentioned, the resources in question include personnel, equipment, teams, supplies and facilities. Meanwhile, the public health resources that would be required to surge public health capabilities during a public health emergency include epidemiological supplies, epidemiologists, epidemiological equipment, and epidemiological response teams.

As most jurisdictions and organizations will not own and maintain the full panoply of needed resources to address potential threats and hazards, the following resource management processes will help those entities make better use of the resources they have, engage private sector resources, involve volunteer organizations, and encourage further development of mutual aid agreements.

Resource management preparedness processes

Of course, resource management preparedness, whoever practices it, isn't a standalone activity. Far from it. Resource management preparedness should fit into comprehensive emergency management preparedness more broadly.

Indeed, resource management preparedness should be layered on top of emergency operations planning activities that entities are already engaging in. But what are the relevant processes that go into resource management preparedness itself?

Those processes include:

Acquiring, storing, and inventorying resources. Entities acquire, store, and inventory resources for day-to-day operations, in addition to stockpiling resources for incidents. This collaborative resource management preparedness should therefore involve maintaining resources as well as coordinating with other entities to track and inventory broad operational capabilities and logistical requirements, e.g., storage.

Identifying and typing resources. Primarily focused on resources that deploy across jurisdictional boundaries, the process of identifying and typing resources help entities build a common understanding of specific resources and their capabilities.

Qualifying, certifying, and credentialing personnel. Human resources tend to be the most important during an emergency. But not all personnel are qualified. Entities, as such, must undertake the process of qualifying, certifying, and credentialing personnel to ensure they will operate effectively in a disaster zone. As this end-to-end process can vary depending on the rules of the jurisdiction, this guide will not tackle qualifying, certifying, and credentialing personnel further.

Planning for resources. This planning process takes into account that jurisdictions and organizations must work together before incidents occur to develop plans for identifying, managing, estimating, allocating, ordering, deploying, and demobilizing resources. As a result, this process consists of identifying resource requirements based on a careful threat assessment. Planning for resources also entails estimating current capabilities, assessing resource management gaps, establishing resource management planning priorities, and making use of mutual aid agreements to address gaps.

Acquiring, storing, and inventorying resources

How do entities procure resources in the first place? Well, they can do so in any variety of ways, the most likely being purchase, donation, and hiring (personnel). However, public-sector acquisition processes and protocols tend to be jurisdiction specific.

Nevertheless, once resources have been procured, the entity should properly store them for future use – storage processes and procedures, for their part, can also vary from jurisdiction to jurisdiction.

At this stage, though, effective resource management will involve establishing a resource inventory and keeping its contents current and accurate. The purpose of an accurate inventory, which can be paper-based or digitized, though the latter incurs far less risk, is to enable entities to both (1) resource incidents promptly and (2) support day-to-day activities such as reconciliation, accounting, and auditing, which also fall under the rubric of resource management.

Per NIMS, when inventorying and organizing resources, entities might want to categorize their assets in the following way:

Core capability. The core capability for which a resource is most useful

Category. The function for which a resource is most useful (for example, firefighting, law enforcement, or health and medical)

Resource kind. One of the five main resource types, such as personnel, facilities, or equipment

Type. A resource's level of minimum capability to perform its function

- Type 1 represents a higher capability than Type 2, which represents a higher capability than Type 3 and so on
- Capability levels tend to be determined by size, power, and capacity (for equipment) or experience and qualifications (for personnel and teams)

The primary benefit of systematizing the acquiring, storing, and inventorying of resources is that it allows the supplying organization, or provider, to understand expectations of a resource based on the capabilities outlined in resource typing.

Another benefit is that it better enables requesting organizations to receive a preassembled and predetermined resource that meets their minimum capabilities for the specified resource type.

Lastly, resource management doesn't just apply to the emergency context it applies to business-as-usual (BAU) activities, as well. Systematizing the acquiring, storing, and inventorying of resources, therefore, helps integrate resource management into day-to-day organizational and jurisdictional operations.

Identifying and typing resources

When it comes to pre-identifying resources that a jurisdiction or organization wants to align with NIMS resource typing definitions (or peer methodologies such as AIIMS (AU), CIMS (NZ), and JESIP (UK)), we are talking about the process of identifying NIMS-typed resources.

Entities might also have additional resources not currently NIMS-typed but still used regularly. In this case, the best practice is to identify NIMS-typed resources that are:

- Widely used and deployable across jurisdictional boundaries through mutual aid agreements or compacts
- Identifiable by capability, category, and kind
- Countable and trackable to determine availability
- Used for incident management, support, and coordination under the Incident Command System (ICS) or in Emergency Operations Centers (EOC)
- Interoperable or compatible through common resource ordering, management, and tracking systems.

Typing these resources will involve aligning resource capabilities to those in the NIMS resource typing definition. This is often done to ensure a shared understanding (with mutual aid partners) of the capabilities and functions of each resource so that that resource can be shared more quickly and accurately when necessary.

Further benefits of identifying and typing resources include:

- Ensuring minimum capabilities across shared resources
- Establishing a common language across jurisdictions and organizations
- Simplifying and speeding up the process of ordering and providing resources during response
- Enabling communities to plan for, request, and share resources confidently
- Facilitating mutual aid agreements using established resources and teams
- Providing a clear understanding of capacities and capabilities, allowing jurisdictions and organizations to easily identify gaps

What principles should entities follow when typing resource definitions, though? According to NIMS, they should follow the below:

- **Differentiating types based on capabilities.** Resources receive their type assignments based on capability or qualification rather than on quantity or capacity. For example, increased capability reflects a higher level of education or training, or additional abilities or responsibilities.
- **Establishing the minimum.** Resource typing seeks to standardize minimum resource capabilities across the country. Jurisdictions that own, operate, and maintain resources are free to add extra levels of capability or capacity; resources will likely vary in many ways, including training requirements, equipment and supplies and numbers of personnel.
- **Representing a broad national perspective**. Resource types reflect the capabilities of jurisdictions around the country, not the specialized requirements of a particular jurisdiction or a geographic area. Resource types should account for variations in size, scope, and resources of jurisdictions around the country.
- **Using measurable industry standards.** Where possible, resource types reflect the established industry standards within a given industry or profession, such as those required by national law or provided by accrediting organizations and associations.

Planning for resources

The final process we will tackle is planning for resources. The process, as the name suggests, requires finding ways to fill the gaps between current capabilities and resource demands during a large-scale incident.

Planning itself involves the processes and mechanisms for requesting and managing response and recovery resources. It also helps entities identify what kinds of resources and what capabilities may be necessary if an incident's demands exceed a responder's current capabilities.

The overall planning process includes estimating those capabilities, identifying departments and agencies responsible for specific resource management functions, and discerning gaps in capabilities.

The process is intended to help entities answer the following questions:

- What do we need to prepare for?
- What resources do we have that allow us to achieve our targets?
- What resources can we obtain through mutual aid to be prepared to meet our targets?

This approach is fundamentally sound. After all, it's intuitive that understanding what resources might be necessary is the precondition for identifying the sources for procuring those resources. Similarly, aligning an entity's current capabilities with estimated resource needs is a critical step in the preparedness planning process.

Digital resource management software capabilities to consider

While comprehensive, the end-to-end resource management process won't happen on its own. What will help?

In our experience, key to making this process work is digital emergency management software. These are platforms, available to private organizations, public entities, and non-profits alike, that provide all the information and tools needed to manage any incident effectively through its entire lifecycle of mitigation, preparedness, response, and recovery. They also boast advanced resource management capabilities, as well as other emergency and disaster planning functionality in the digital EOC format.

What resource management capabilities, specifically? These platforms help you effectively allocate resources throughout an emergency response, adapting teams and roles for incident needs.

Further capabilities include:

- Flexible resource assignment structures that can be filled and activated when needed
- Ability to work in a digital 'room' of your EOC, with easy-to-set-up dashboards and collaboration spaces provided for emergency teams such as command, operations, planning, and logistics
- Ability for staff to quickly request or confirm shifts from their mobile device
- Ability to represent and track any type of asset in the system, be they generators, fire engines, sandbags, etc., by using drag-and-drop designer tools.
- Sixty-seven NIMS equipment templates

Finally, critical events are increasing in kind, cost, and quantity. Meanwhile, resources, too often, remain fixed in number, while degrading in capability. Entities will have to make up the difference with advanced resource management planning. Only then can they strike the right balance between maximizing the productivity of available resources and avoiding over-use, enhance ROI and transparency, while ultimately keeping people and property safe.

Sources

i. *Federal Emergency Management Agency. Available at https://emilms.fema.gov/IS700aNEW/NIMS0104summary.htm.*

ii. *Similarly, in Australia, AIIMS (the Australasian Inter-service Incident Management System) provides a common management framework, applicable across a whole host of incidents from small to large, to assist with the effective and efficient control of incidents. The framework offers the basis for an expanded response as incidents grow in size and complexity.*

iii. *Federal Emergency Management Agency: National Incident Management System Guideline for Resource Management Preparedness. Available at https://www.fema.gov/sites/default/files/documents/nims-guideline-resource-management-preparedness.pdf.*

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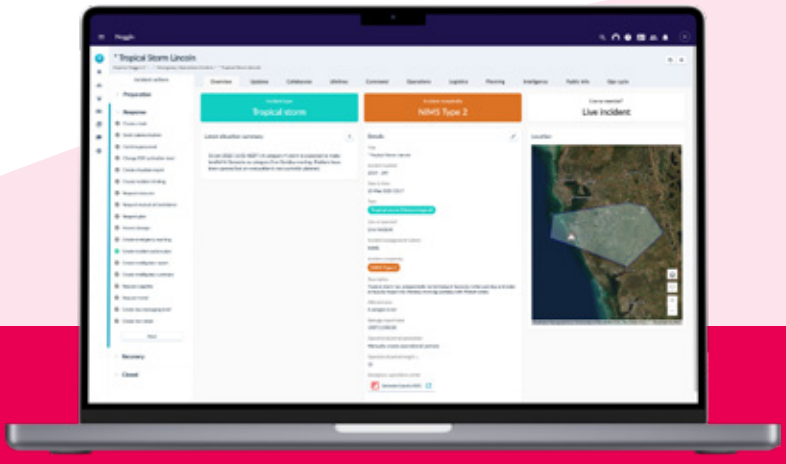

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