



Maintaining a CERT Program - Step 4: Maintaining Records

Overview

Records maintenance is an important part of your CERT program. You may want to track:

- Marketing contacts.
- People who express interest in CERT.
- Current CERT members by teams.
- Completion of basic and advanced training.
- Instructors and training schedules.
- Administrative information and budget information.

Setting up a good recordkeeping system early on—and keeping it current—will make the job easier.

Contents

This step includes the following resources:

- Maintaining CERT Records
 - Tips for Maintaining Records
 - Sample Training Record
 - Sample Expression of Interest Record
 - Sample Marketing Contacts Worksheet
 - Sample Instructor Background Questionnaire
 - Sample Instructor Record
 - Sample Registration Form
 - Sample Training Schedule
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Web Resources

- Sample Training Schedule: Los Angeles
Web Address: <http://www.cert-la.com/Basic.htm>
 - Sample Training Schedule: Hernando County, FL
Web Address: <http://www.co.hernando.fl.us/em/events.htm>
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How To: Maintaining CERT Records

Maintaining records can be tedious, but without proper recordkeeping, you will quickly fall behind and lose track of your program. Some tips for maintaining records are included below:

- **Identify your information needs and develop your forms from the start.** Begin by identifying the potential information requests you will receive as a CERT coordinator. Then design your recordkeeping forms to meet your information needs before your program begins. Next, consider how you will track and organize the information you are collecting. And, finally design simple formats for reporting CERT accomplishments.
- **Collect only the data you need.** Some personal information, such as home telephone and Social Security Numbers are protected from release by the Privacy Act. Some States protect driver license numbers and other information. Release of protected information requires the consent of each individual. The safer approach to protecting information is to not collect it unless you really need it.
- **Keep your database simple and backed up.** Add information only as you need to. If your database is computerized, backup the database frequently. Keep these backup copies in a safe place (e.g., store the backups at a different location).
- **Don't bury yourself in records.** Don't maintain data you won't need or won't use. Think carefully about what you really want to record before developing your forms.
- **Test the forms with your first class.** Provide the forms to your first class to ensure that they record the information you need and work the way you want them to work.
- **Set aside time for record maintenance.** Don't let recordkeeping get ahead of you. Set aside time every day or every week to input data. Develop a plan for archiving or destroying old records.
- **Be careful about sharing data.** Sharing forms is one thing, but sharing personal data may be unlawful. As stated above, certain types of data, such as Social Security Numbers and home telephone numbers is covered under the Privacy Act and may not be released without the individual's permission. If you use a computerized database, it should be password protected.
- **Enlist some help.** If you don't have an administrative assistant assigned to the program, try to enlist one of the CERT graduates to help you. CERT graduates are doing much more than response. In many communities, graduates are coordinating newsletter development, coordinating websites, maintaining equipment, and many other jobs. Why not recordkeeping?



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Words of Advice: Tips for Maintaining Records

Stew Anderson - Natrona County, Wyoming **Track Important Information**

Recordkeeping is important so that you know:

- Who has completed 100% of the basic training.
- What types of advanced training individuals have completed.
- What types of events (emergency/non-emergency) individuals want to be called out to.
- Locations individuals are willing to travel to.

The other records we keep are CERT member addresses and contact information so we know where CERT members are located.

Rachel Jacky - Portland, Oregon **Reasons To Keep Good and Accessible Records**

There are operational, administrative, and political reasons to keep good and accessible records.

- **Operational:** During emergency operations, the teams may self-activate; however, if the sponsoring agency needs to activate the teams, it will need reliable and quick information—where the teams are, how big they are, who their contact persons are.
 - **Administrative:** Administratively, we need to keep track of how many people have completed the training, up-to-date contact info for each participant, and information on things like advanced training they may have taken.
 - **Political:** Finally, recordkeeping is necessary to generate statistical information for interested parties, such as elected officials, about the number of participants in different parts of the city and the growth of the program.
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Joe Lowry - Memphis, Tennessee **Maintain Up-to-Date Rosters**

Up-to-date rosters are a pretty important tool for team leaders, fire station captains, or anyone who needs a reliable list for contacting program participants.

Dale Kleos - Whatcom, Washington **Stay in Communication**

One main reason we keep records is for communication. Accurate records are needed in order to stay in communication with the graduates. In addition, we have registered emergency workers. Keeping records allows CERT volunteers to be eligible for benefits and insurance as part of that registry.



Maintaining a CERT Program - Step 4: Maintaining Records

Words of Advice: Tips for Maintaining Records (Continuing)

Frank Lucier - San Francisco, California **Safeguard Personal Information**

We are in the business of training and every business keeps records, especially training records. But as with any personal information, you have to get the people's permission to share their information with neighborhood team leaders. We ask the participants, before the end of each training session, if we can share their personal information with the team leaders.

We only kept data that was critical to the program—name, address, phone number, email addresses, training dates, other classes taken, special skills, team assigned to, and team position. Our City Attorney felt that keeping other information (Social Security numbers, driver's license numbers, etc.) could cause some legal issues if they ever got in the wrong hands.

Bottom line is that we guarded personal information with our lives. We kept it on only one computer and this computer was not hooked up to the Internet or our internal network.



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Training Records

Keeping accurate training records is critical for both effective resource management and for preventing liability issues. A sample training record form is shown on the next page.



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Training Records

CERT Member Personal Information									
Title:	First Name:			MI:	Last Name:			ID #:	
Address:				City:			State:		Zip:
Telephone Numbers:	Home:			Work:			Fax:		
	Pager:			Cell:					
Email Address:									
CERT Type: (Check all that apply)									
<input type="checkbox"/> CERT-NBH	<input type="checkbox"/> CERT-SCH	<input type="checkbox"/> CERT-FBO	<input type="checkbox"/> CERT-BUS	<input type="checkbox"/> CERT-GOV	<input type="checkbox"/> CERT-UN	<input type="checkbox"/> CERT-Y			
Region Name:				Name of Sub-Division (neighborhood):					
Team Affiliation	<input type="checkbox"/> Yes	<input type="checkbox"/> No	CERT Name:				Team #:		
Reg. Complete	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Waiver Signed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Team Leader	<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Training Completed									
Basic CERT Course Completed			<input type="checkbox"/> Yes	<input type="checkbox"/> No	Date Course Completed:				
Certificate Issued	<input type="checkbox"/> Yes	<input type="checkbox"/> No	ID Issued	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
Date Basic Course 1:				Date Basic Course 2:					
Fire Supp. Completed	<input type="checkbox"/> Yes	<input type="checkbox"/> No	S&R Completed	<input type="checkbox"/> Yes	<input type="checkbox"/> No				
Date Refresher Course # 1:				Date Cont. Ed. Course # 1:					
Date Refresher Course # 2:				Date Cont. Ed. Course # 2:					
Date Refresher Course # 3:				Date Cont. Ed. Course # 3:					
Date Refresher Course # 4:				Date Cont. Ed. Course # 4:					
Date Drill # 1:				Date Activation #1:					
Date Drill # 2:				Date Activation #2:					
Date Drill # 3:				Date Activation #3:					



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Expression of Interest Record

You may want to use a spreadsheet to track contacts with potential volunteers and others who express interest in your CERT program. A sample spreadsheet is shown below.

Sample Expression of Interest Record							
Last Name	First Name	Street	City	Zip	Phone	Request Date	Response Date



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Marketing Contacts Worksheet

You may want to use a spreadsheet to help you track your marketing contacts. A sample spreadsheet is shown below.

CERT Marketing Contacts								
Last Name	First Name	Organization	Street Address	City	Zip	Phone	Email	Meeting Date
Gould	Alisa	Volunteer Alliance	123 Main Street	Riverside	12222	540-790-8321	Agould@va.org	03/21/03



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Instructor Background Questionnaire

You may want to use a questionnaire to gather information about potential instructors. A sample questionnaire is shown on the next page.



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Instructor Background Questionnaire

CERT INSTRUCTOR BACKGROUND QUESTIONNAIRE			
Name:			
Address:	Work Phone:		
	Home Phone:		
	Fax:		
Employer:	Email Address: (if available)		
<p>PLACE A CHECK NEXT TO ALL AREAS THAT YOU HAVE PAST EXPERIENCE.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> CERT Program <input type="checkbox"/> Fire safety and fire suppression <input type="checkbox"/> Hazardous materials safety <input type="checkbox"/> Emergency medical triage & treatment <input type="checkbox"/> Search & rescue techniques and markings </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Incident Command System (ICS) operations <input type="checkbox"/> Disaster psychology <input type="checkbox"/> Exercise controller <input type="checkbox"/> Other: (List) </td> </tr> </table>		<input type="checkbox"/> CERT Program <input type="checkbox"/> Fire safety and fire suppression <input type="checkbox"/> Hazardous materials safety <input type="checkbox"/> Emergency medical triage & treatment <input type="checkbox"/> Search & rescue techniques and markings	<input type="checkbox"/> Incident Command System (ICS) operations <input type="checkbox"/> Disaster psychology <input type="checkbox"/> Exercise controller <input type="checkbox"/> Other: (List)
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<p>Please list your past training presentation experience.</p> 			
<p>Place a check next to all areas that you wish to be considered for.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Lead Instructor <input type="checkbox"/> Co-Instructor for: <input type="checkbox"/> Emergency Preparedness <input type="checkbox"/> Fire Safety/Hazardous Materials <input type="checkbox"/> Emergency Medical Operations </td> <td style="width: 50%; vertical-align: top;"> <input type="checkbox"/> Exercise Safety Officer <input type="checkbox"/> Light Search and Rescue <input type="checkbox"/> Disaster Psychology </td> </tr> </table>		<input type="checkbox"/> Lead Instructor <input type="checkbox"/> Co-Instructor for: <input type="checkbox"/> Emergency Preparedness <input type="checkbox"/> Fire Safety/Hazardous Materials <input type="checkbox"/> Emergency Medical Operations	<input type="checkbox"/> Exercise Safety Officer <input type="checkbox"/> Light Search and Rescue <input type="checkbox"/> Disaster Psychology
<input type="checkbox"/> Lead Instructor <input type="checkbox"/> Co-Instructor for: <input type="checkbox"/> Emergency Preparedness <input type="checkbox"/> Fire Safety/Hazardous Materials <input type="checkbox"/> Emergency Medical Operations	<input type="checkbox"/> Exercise Safety Officer <input type="checkbox"/> Light Search and Rescue <input type="checkbox"/> Disaster Psychology		
Your Signature:	Date:		



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Sample Instructor Record

You may want to use a spreadsheet to help maintain instructor information records. A sample spreadsheet is shown below.

Sample Instructor Record						
Last Name	First Name	Street	City	Zip	Training Area(s)	Train-the-Trainer Completion Date



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Sample Registration Form

You may want to use a registration form to identify individuals interested in attending CERT training. A sample registration form is shown below.

COMMUNITY EMERGENCY RESPONSE TEAM (CERT) TRAINING/SPRING 2003		
<p>I would like to register for the eight-session CERT training and would like to attend:</p> <p><input type="checkbox"/> Wednesday evenings [DATES HERE]</p> <p><input type="checkbox"/> Saturday mornings [DATES HERE]</p> <p><input type="checkbox"/> I am unable to attend the training this spring, but please contact me about future CERT training.</p>		
PLEASE PRINT CLEARLY:		
NAME:		
STREET ADDRESS:		
CITY:	STATE:	ZIP:
NEAREST CROSS STREET TO YOUR HOME ADDRESS:		
TELEPHONE (DAY):	(EVENING):	
EMAIL AT WHICH YOU WANT TO RECEIVE CERT INFORMATION:		
<p>Please mail this form (one registration per form, please) to:</p> <p style="text-align: center;"><i>[ADDRESS HERE].</i></p>		
<p>FOR MORE INFORMATION ABOUT THE [COMMUNITY] CERT PROGRAM, PLEASE CHECK [WEB ADDRESS] OR CALL [TELEPHONE CONTACT NUMBER].</p>		



Maintaining a CERT Program - Step 4: Maintaining Records

Sample Training Schedule

You may want to use a spreadsheet to create a CERT training schedule. A sample spreadsheet is shown below.

Sample CERT Training Schedule								
Class Title	Session	Date	Location	Begin Time	End Time	Instructor	Co-Instructor	Safety Officer