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Deloitte-NEMA National Risk Study 2025: Changing landscapes in state emergency management

A nationwide survey reveals funding,
workforce, and technology challenges
shaping state emergency management today



Introduction

Emergency management in the United States is evolving amid a confluence of trends such as intensifying natural disasters, evolving manmade threats, changing roles of state and federal government, and rising public expectations. Recent hurricanes, wildfires, and widespread flooding underscore the urgent need for well-funded organizations that embrace forward-thinking strategies and prioritize risk-based planning and preventative measures to protect communities before crises strike. However, agencies operate within limited budgets, requiring decisions and tradeoffs between acute needs and longer-term resilience.

To more effectively understand how state and territorial emergency management agencies are equipped to fulfill their missions, the Deloitte Center for Government Insights—working with the National Emergency Management Association (NEMA) and with consulting support from the National Center for Disaster Preparedness at Columbia University's Climate School—conducted a nationwide survey from late 2024 through early 2025. The survey engaged 55 state and territory emergency management agencies

across NEMA's membership and received 42 responses, including 14 stakeholder interviews, covering the 10 Federal Emergency Management Agency (FEMA) regions. The survey explores current priorities and capabilities, and it identifies challenges to help envision potential futures of emergency management.

The insights reveal a tight-knit community of emergency managers navigating an increasingly complex environment. It highlights their diverse priorities, workforce challenges, technological capabilities and needs, and funding requirements. Our analysis also identifies strategic questions that emergency managers may consider as they plan for the future.

The strength of the emergency management community lies in its tradition of partnership and collaboration. Continued collaboration between states, industry organizations, the private sector, and academia can provide valuable support as states evolve to meet today's evolving challenges and safeguard our communities.

10

FEMA regions represented

55

States and territories engaged

42

Survey responses received

12

Stakeholder interviews completed

Five key insights

Funding, an expanding mandate, and workforce issues are the leading challenges for states

Funding is the top concern of state emergency directors

64% of respondents named funding of the emergency management life cycle as their most significant challenge, above workforce limitations, policy changes, and technology.

The benefits of advanced technology have not been realized

States currently exhibit intermediate technology maturity, with limited adoption of advanced technology despite strong interest and recognition of its potential value.

Agencies face an expanding mandate

In addition to natural disasters like flooding, tornadoes, and wildfires, emergency managers find themselves involved in novel threats such as pandemics and potential cyberattacks.

Time is not currently allocated to preferred activities

While most respondents would prefer to spend their time on mitigation, only 5% of their time is currently spent mitigating risks.

Agencies struggle to recruit and retain their workforce

Budget constraints and a competitive job market compound the challenge to retain or recruit staff with the required skills and experience.

Funding is the top concern of directors

“So, when do we invest in emergency management? The grants have been flat for years, and more and more is being put on us to handle.”

– A state emergency management director

Respondents named funding limitations as their top challenge

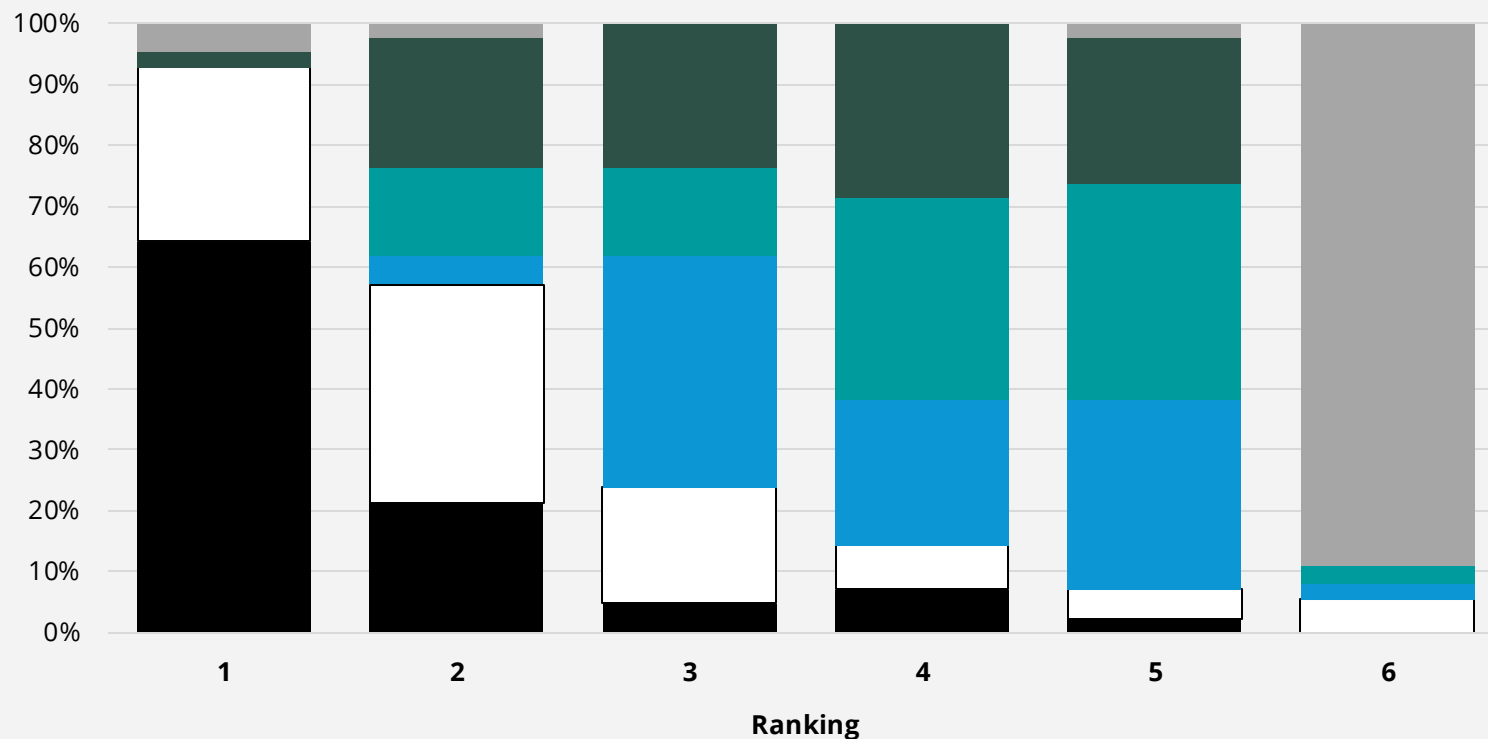
64%

of respondents listed funding as a significant concern, selecting it as their top challenge. The continuous occurrence of disasters and the emergence of novel risks heighten the need for increased funding for mission-critical activities such as disaster mitigation, response, employee compensation, training, and procurement.

Although procedural limitations and technology issues were not ranked as the top challenges, agencies generally rated them as moderately challenging.

Most challenging aspects of emergency management

- Funding
- Workforce
- Procedural
- Technology
- Policy
- Other



Note: n = 42. Funding: External conditions related to funding. Workforce: Difficulty in obtaining and retaining qualified staff. Procedural: Any process that limits your organization. Technology: Dated software or hardware, lack of access. Policy: Regulatory restrictions that impact operations. Other: Absence of nonfederal funding to support emergency management and limited authority over partner agencies for enterprise emergency management initiatives. Source: National Risk Survey 2025.

Securing funding for infrastructure resilience and new disaster programs is a top priority

When asked specifically to select top policy priorities, states prioritized those related to funding, garnering the highest response rates.

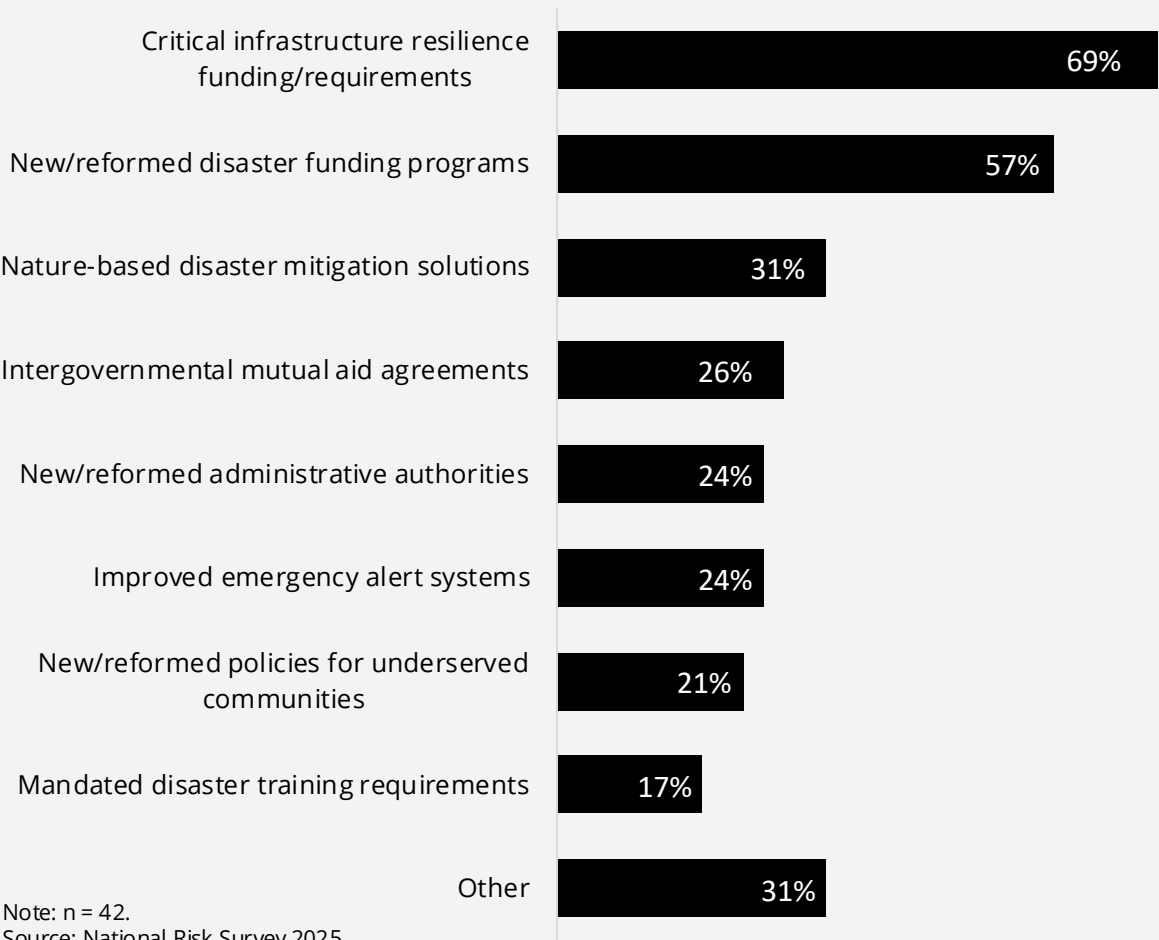
Beyond these top funding-related priorities, response rates significantly drop, with no other single priority exceeding 31%. This indicates a diverse range of concerns among state emergency managers. The “other” category itself is notably diverse, encompassing a wide array of specific concerns and priorities unique to different respondents.

Note: “Other” includes homeland defense planning and nation state threat response; talent management/development; enhancing local government support for emergency management; state-level policy and funding revisions; sustainment of existing capabilities that are at risk due to budget reductions; core emergency management preparedness and capacity building; unmanned aircraft system/drone operations—policy and implementation; use of artificial intelligence in emergency management; workforce development with diversity and inclusion; use of technology to enhance the workplace and workforce development; capacity/capability building and mitigation investment; and building state and local capacity for increased workload.

Top 3 priorities identified by agencies this year

Respondents were asked to select their top three choices

Percentage of respondents



Note: n = 42.

Source: National Risk Survey 2025.

While states have invested in state-run programs, most could do more, potentially necessitating substantial policy changes

Most states are tapping into their own resources to fund their state's unique emergency management needs. Interview respondents noted that these state-run programs often face funding limitations, competing budgetary priorities, and policy barriers that may constrain their efficacy and impact.

Notably, 26% of states do not currently invest in state-funded programs.

Is your state/territory currently investing financial resources in state-run programs not funded by federal sources?



Note: n = 32.
Source: National Risk Survey 2025.

A majority would allocate additional funding to workforce development

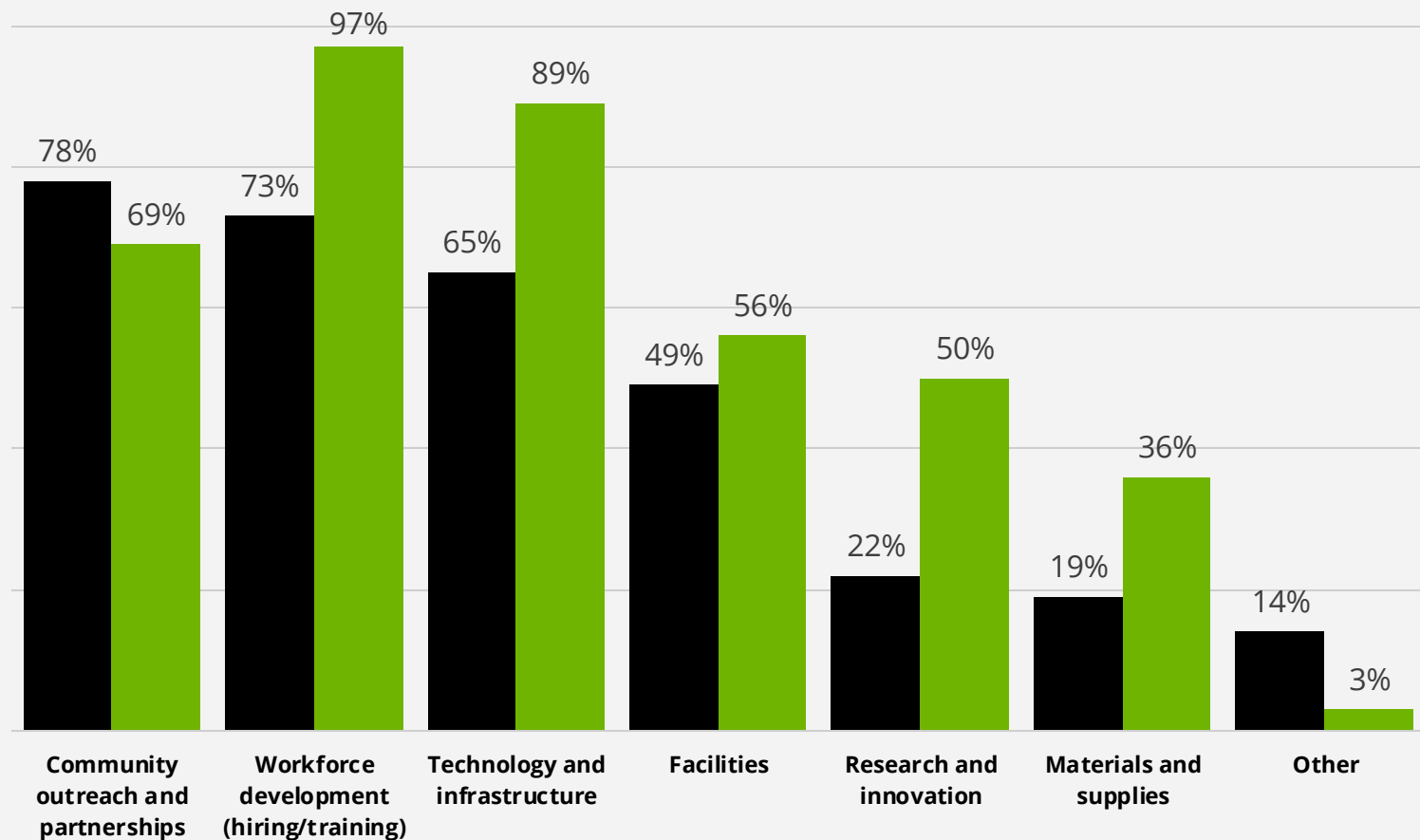
97%

of respondents expressed a desire to allocate more funds to workforce development and technology and infrastructure (89%), if given additional funding.

State agencies currently prioritize community outreach and partnerships (78%), workforce development (73%), and technology and infrastructure (65%), yet they continue to report challenges with workforce and technology.

Current vs. additional funding investment capability development

● Currently investing ● Additional investment



Note: n = 37.
Source: National Risk Survey 2025.

States' main funding sources are in flux

100%

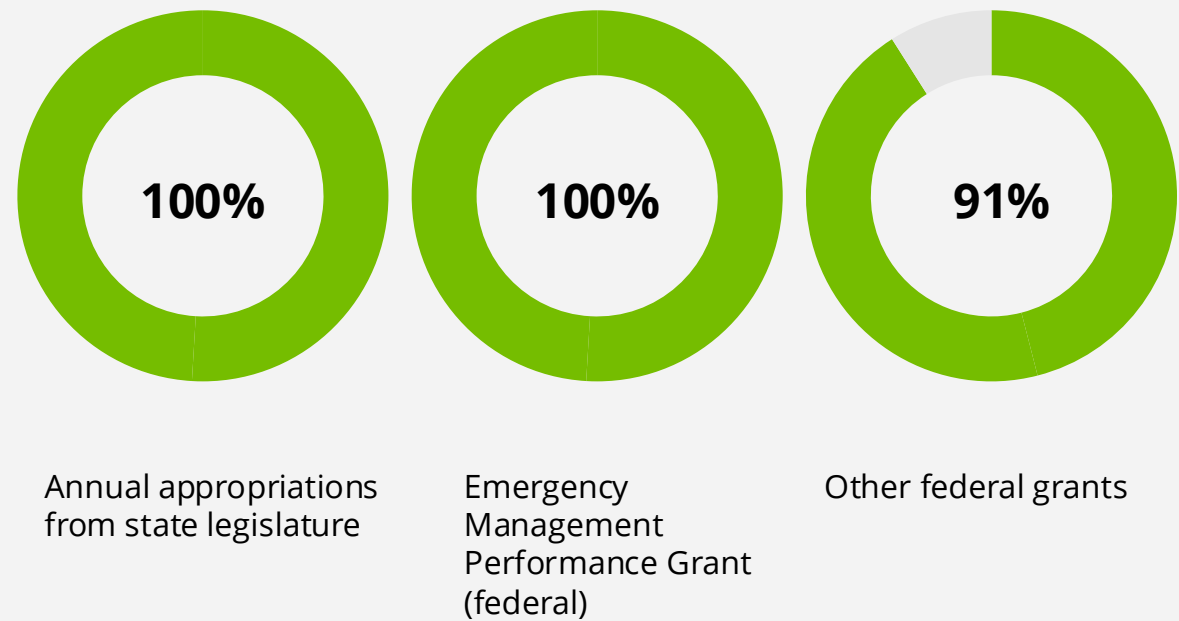
of states and territories rely on federal funding for critical activities, such as preparedness funded through federal Emergency Management Performance Grants, response and recovery funded through FEMA Individual Assistance (IA) and Public Assistance (PA), and other programs, including the Hazard Mitigation Performance Grant and Homeland Security Grant Program.

The broader landscape of funding continues to evolve. Interview respondents noted increasing pressure on these funding streams and underscored the challenge for state directors to navigate financial challenges. As the FEMA Review Council¹ examines the federal government's role in disaster response, federal funding is subject to change. Private insurance, traditionally the largest funder of disaster recovery, has scaled back coverage in the most high-risk markets.²

Sources: ¹Homeland Security, "Federal Emergency Management Agency Review Council," July 18, 2025; ²Gia Snape, "Carrier exits – is the worst over?" *Insurance Business*, May 15, 2024.

Top sources of state emergency management agency funding

Respondents were asked to select all funding sources that apply



Note: n = 36.
Sources: National Risk Survey 2025.

Agencies face an expanding mandate

“We’re constantly jumping from disaster to disaster, and things continue to be more frequent and more costly.”

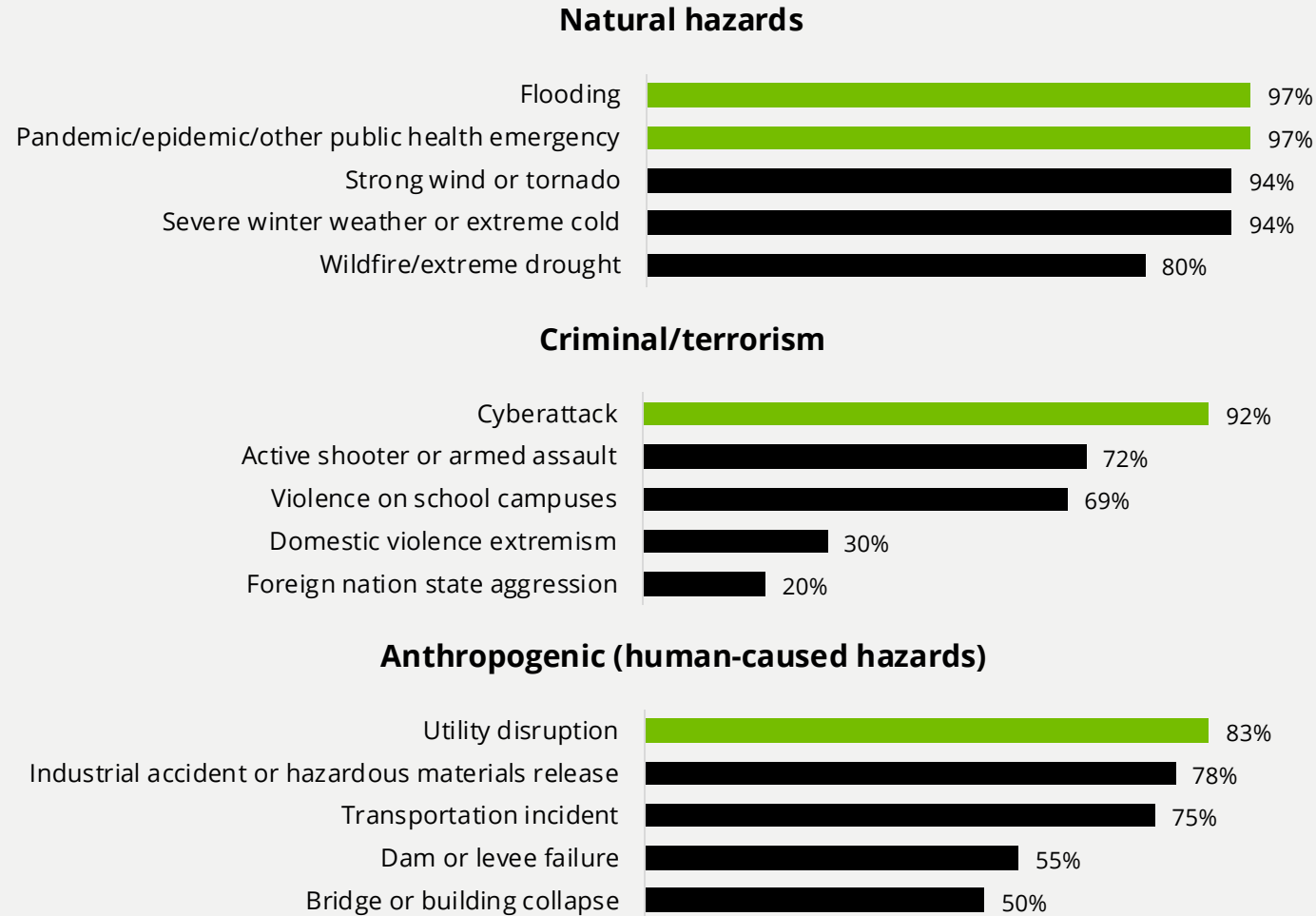
– A state emergency management director

An expanding array of threats, beyond natural disasters, have challenged agencies

State emergency management agencies are responsible for a wide and expanding range of threats, far beyond the natural disasters most people commonly associate with their role. In recent years, they've responded to incidents such as **cyberattacks, active shooter events, utility disruptions, industrial accidents, bridge collapses,** and even threats involving **foreign nation-state aggression.** Survey responses indicate that these non-disaster threats are not one-off anomalies but rather have been commonly experienced in recent years. This contributes to agencies feeling they are asked to “do more with less.”

Top 5 hazards/threats experienced by states/territories in the past five years

Respondents were asked to select all hazards/threats that apply



Note: n = 42.
Source: National Risk Survey 2025.

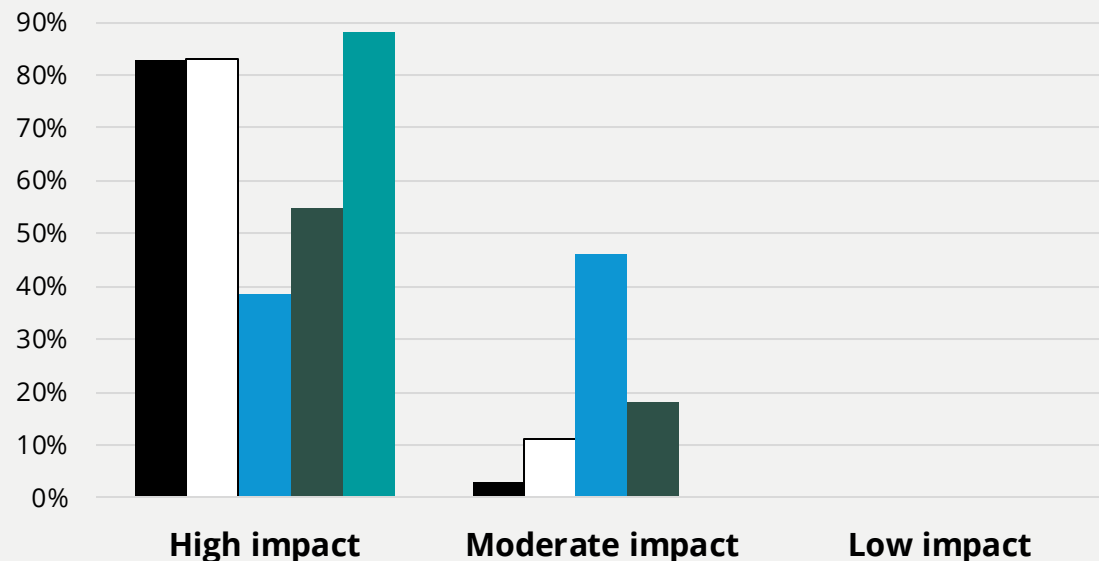
Top hazards and threats require varying levels of investment for response

Flooding and earthquakes were identified as hazards that had the highest potential impact, which would also require the greatest financial investment for response. Other hazards with high potential impact, such as strong winds, tornadoes, and wildfires, would require a more moderate level of investment for response. In contrast, cyberattacks were identified as a high or moderate impact threat, yet would only require a moderate or low financial investment for response.

● Flooding ○ Strong wind or tornado ● Cyberattack ● Wildfire ● Earthquake

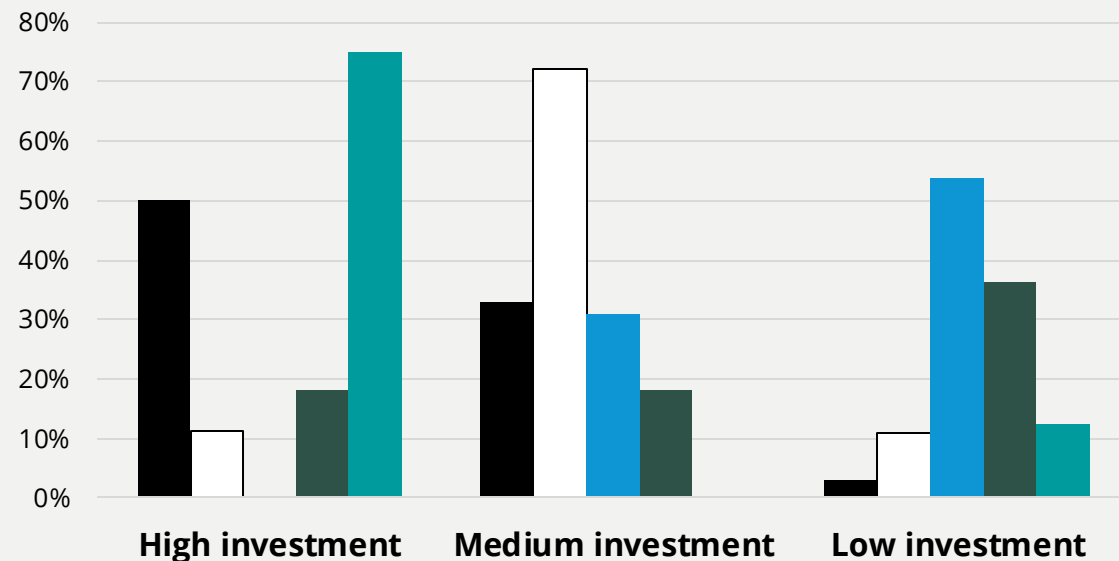
What are the highest impact threats to your state's communities? (Top 5 collective responses out of 20 options)

Respondents were asked to select their top three responses



Note: n = 42.
Source: National Risk Survey 2025.

Of the top 3 threats for your state, which would you anticipate the greatest financial/resource investment for a response?



Note: n = 42.
Source: National Risk Survey 2025.

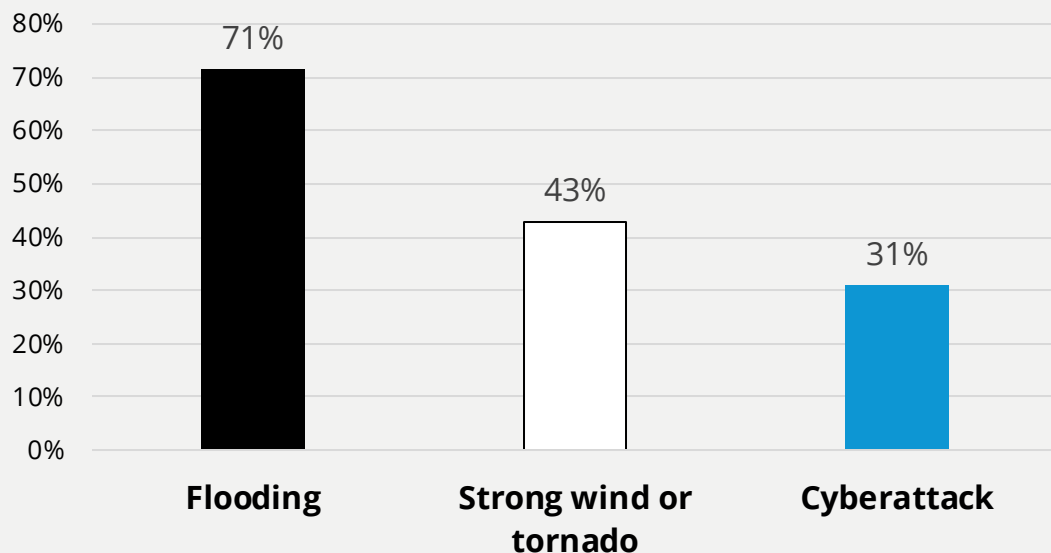
Cyberattack tops the list of threats for which states are least prepared

When asked to identify their top three threats, cyberattack was the only non-natural disaster to emerge in the top three. Agencies reported lower levels of confidence in protecting against a cyberattack compared to other top threats, which speaks to the challenge of integrating emergency management and cyber incident planning.¹

● Flooding ○ Strong wind or tornado ● Cyberattack

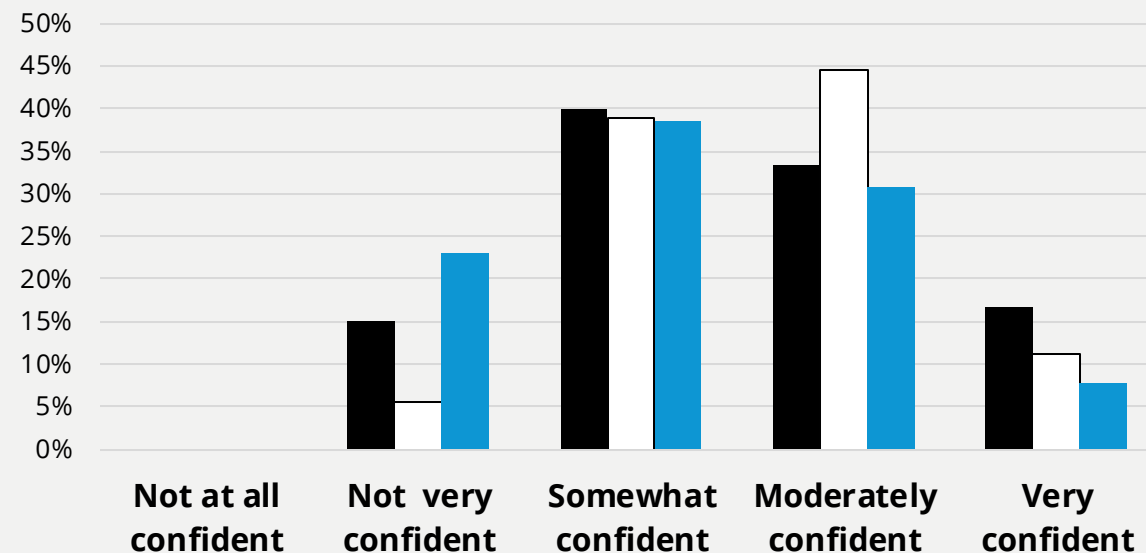
What are the top 3 concerns to the health, safety, and security of your communities? (Top 3 collective responses out of 20 options)

Respondents were asked to select their top three responses



Note: n = 42.
Source: National Risk Survey 2025.

How confident are you in your organization's ability to protect your communities against your top 3 identified risks?



Note: n = 42.
Source: National Risk Survey 2025.

Agencies struggle to recruit and retain their workforce

“Staffing is a continuing struggle without a clear clear solution—there is a need to attract new folks and retain mid-career individuals to continue building experience and capacity across all levels.”

– A state emergency management director

Agencies struggle to retain or recruit staff

81%

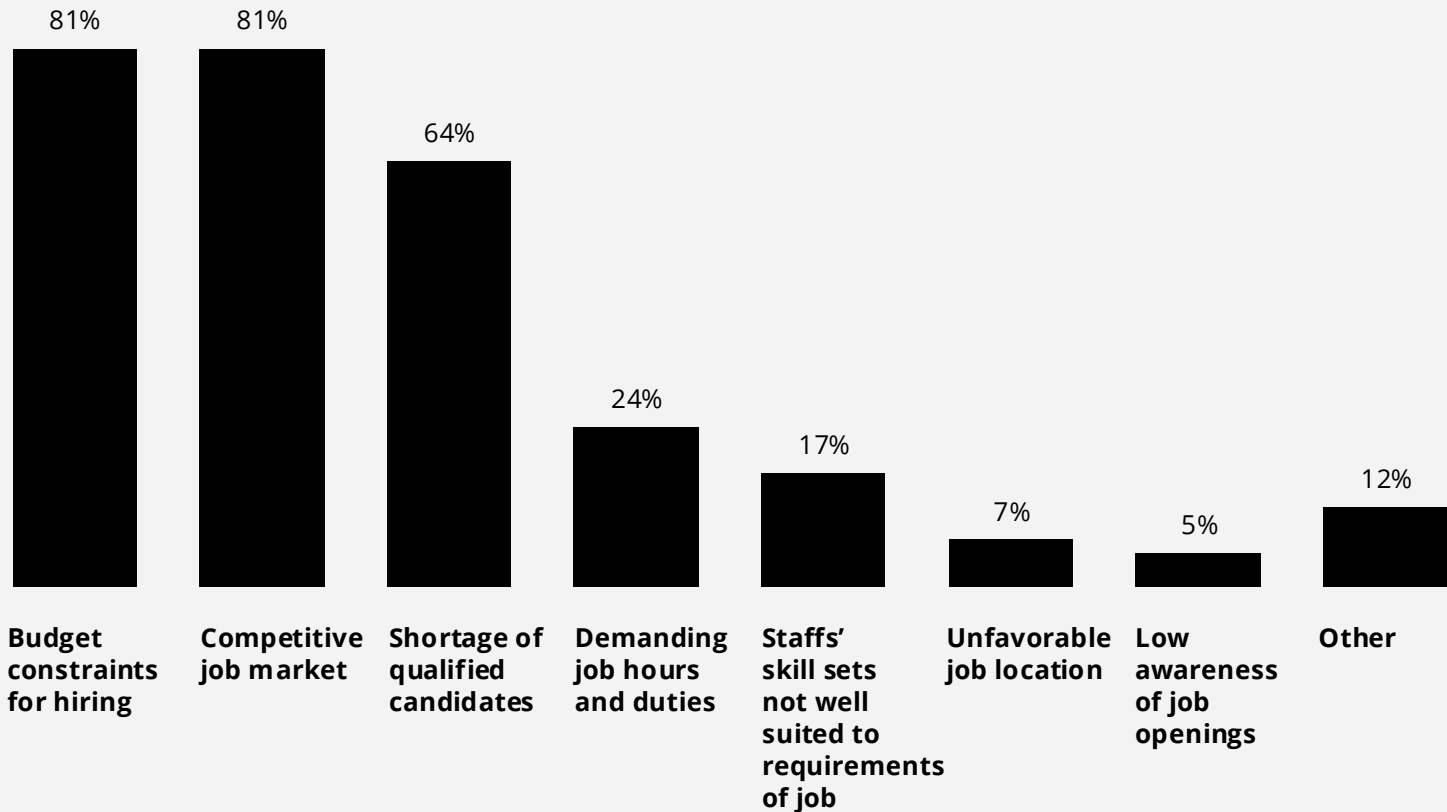
of respondents selected budget constraints and competitive job market, followed by shortage of qualified candidates (64%), as their top three workforce-related challenges.

Workforce and funding challenges are closely interrelated. If additional funds were available, most agencies reported a desire to prioritize workforce investment to enhance their capabilities. The increasing demand in emergency management intensifies competition for qualified candidates, making it essential for agencies to address budget and recruitment challenges effectively.

Key challenges in recruiting and retaining qualified staff

Respondents were asked to select all that apply

Percentage of respondents



Notes: n = 42. "Other" includes low salary; civil services rules; lack of growth and promotion opportunities; and lack of full-time permanent positions and state funding.

Source: National Risk Survey 2025.

Of employees hired in the past five years, survey respondents indicate that half or fewer come with the skill sets and experience to perform the job

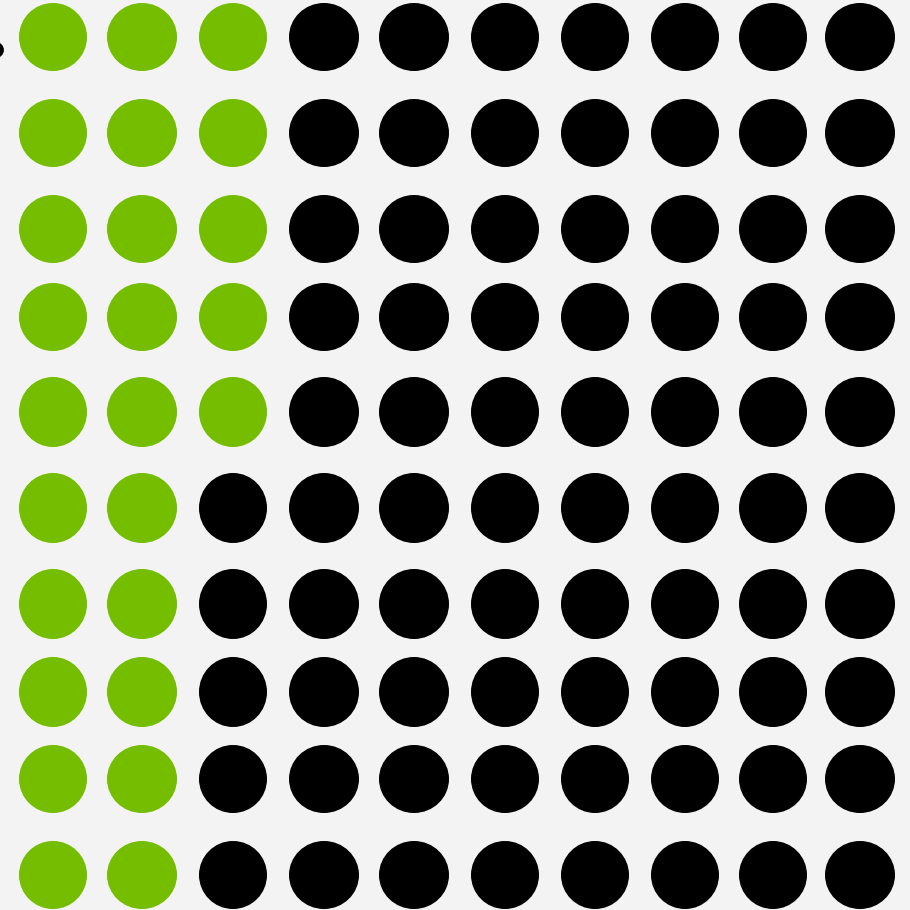
Potential changes at the federal level may further compound this challenge. In addition to funding, FEMA personnel often support state personnel in response efforts. Changes in staffing at the federal level may result in additional responsibility for states, straining their limited resources and exacerbating existing workforce issues.

“Our workforce isn’t readily identifiable, and that’s something we need to address.”

– A state emergency management director

25% —●

of agencies report that employees have the necessary skills



Note: n = 36.
Source: National Risk Survey 2025.

Respondents identified a blend of soft and technical skills as critical for the future of emergency management

Approximately half of the agencies emphasized the importance of soft skills, identifying decision-making under pressure and interagency coordination as the top two most essential skills for the next generation of emergency management professionals.

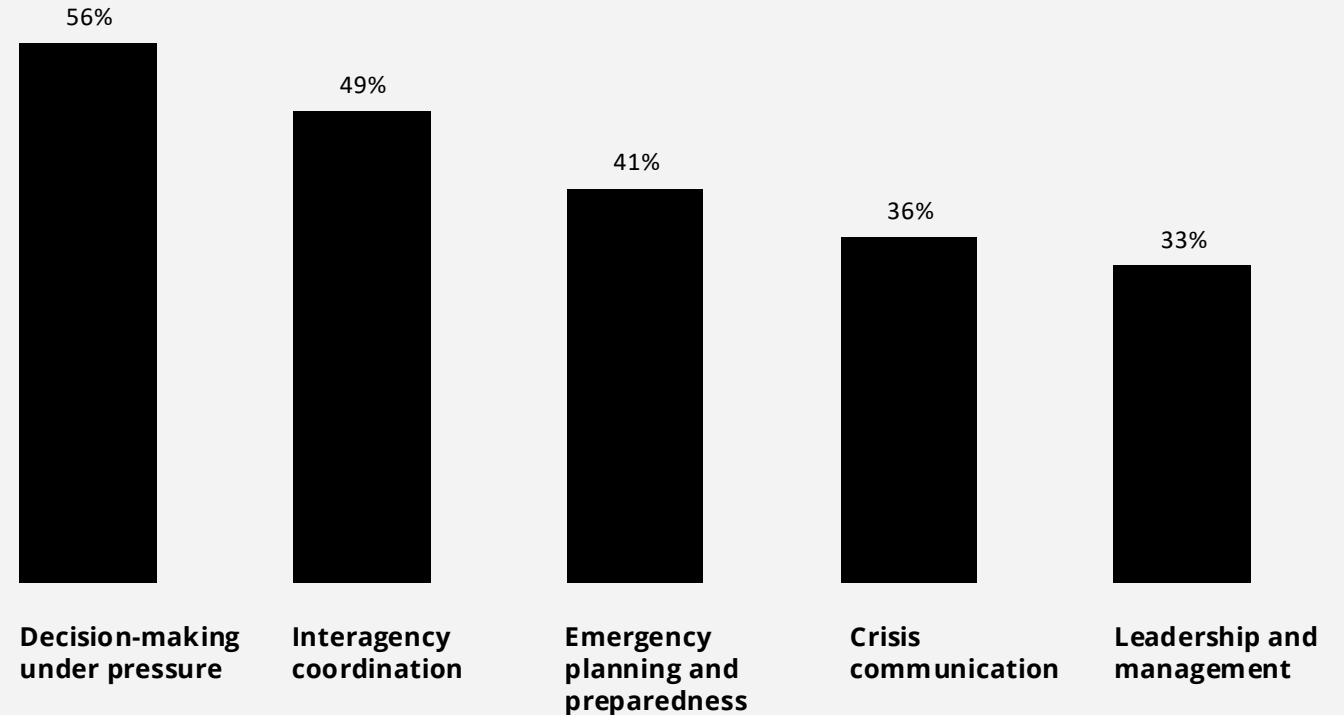
The expanding emergency management mandate, along with budget limitations, could further strain agencies' ability to hire and retain staff with the desired skill sets.

"The workforce is undergoing significant changes, raising questions about the state government's ability to address these developments."

– A state emergency management director

Top 5 essential skills for the future of emergency management

Respondents were asked to rank a list of 10 skills. The percentage of respondents who selected each skill as among their top three skills is listed below.



Note: n = 39.
Source: National Risk Survey 2025.

**The benefits of
advanced
technology have
not been realized**

“At the state level, we’re still trying to figure out how to even use AI, and there’s hesitation because the state legislature is still figuring out the parameters for how we can even use AI.”

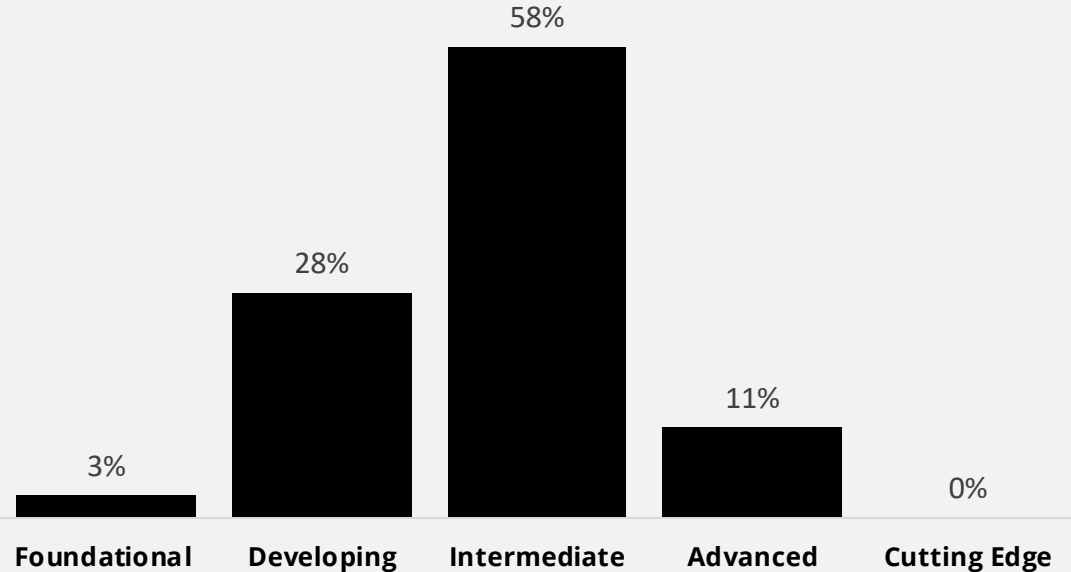
– A state emergency management director

States report intermediate technology maturity, with most feeling technology tools are only somewhat adequate

Advanced technologies can improve response times, resource allocation, and predictive analytics, potentially saving lives and reducing damage. Without these technologies, gaps in cybersecurity, data interoperability, and real-time decision-making may persist, undermining effectiveness in high-stakes situations.

Level of current technology maturity

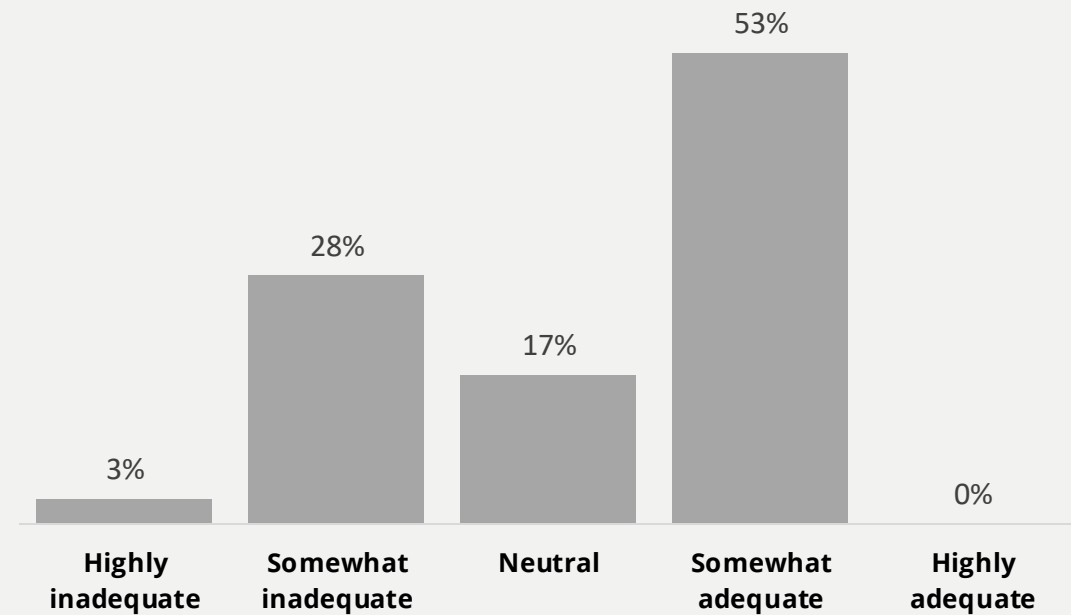
Percentage of respondents



Note: n = 36.
Source: National Risk Survey 2025.

Adequacy of technology tools

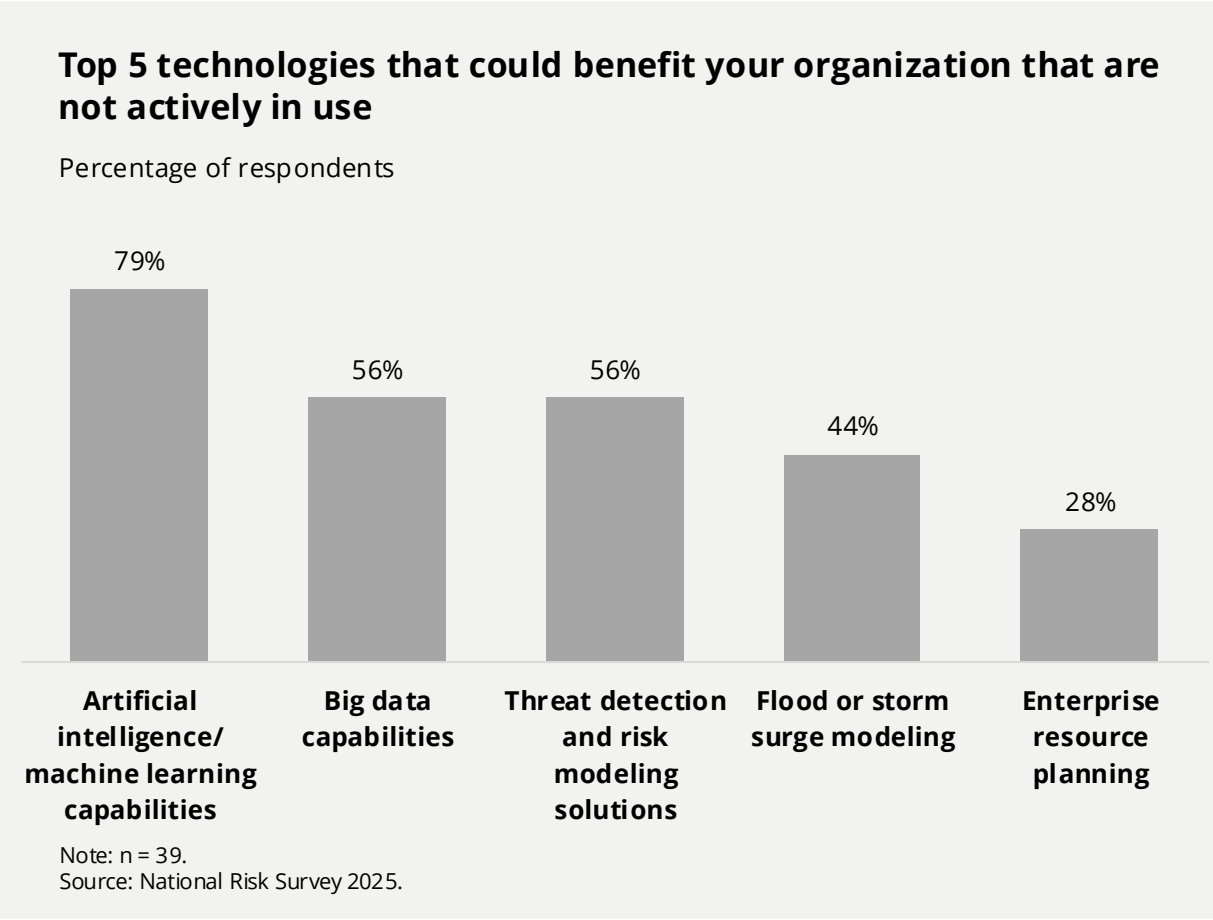
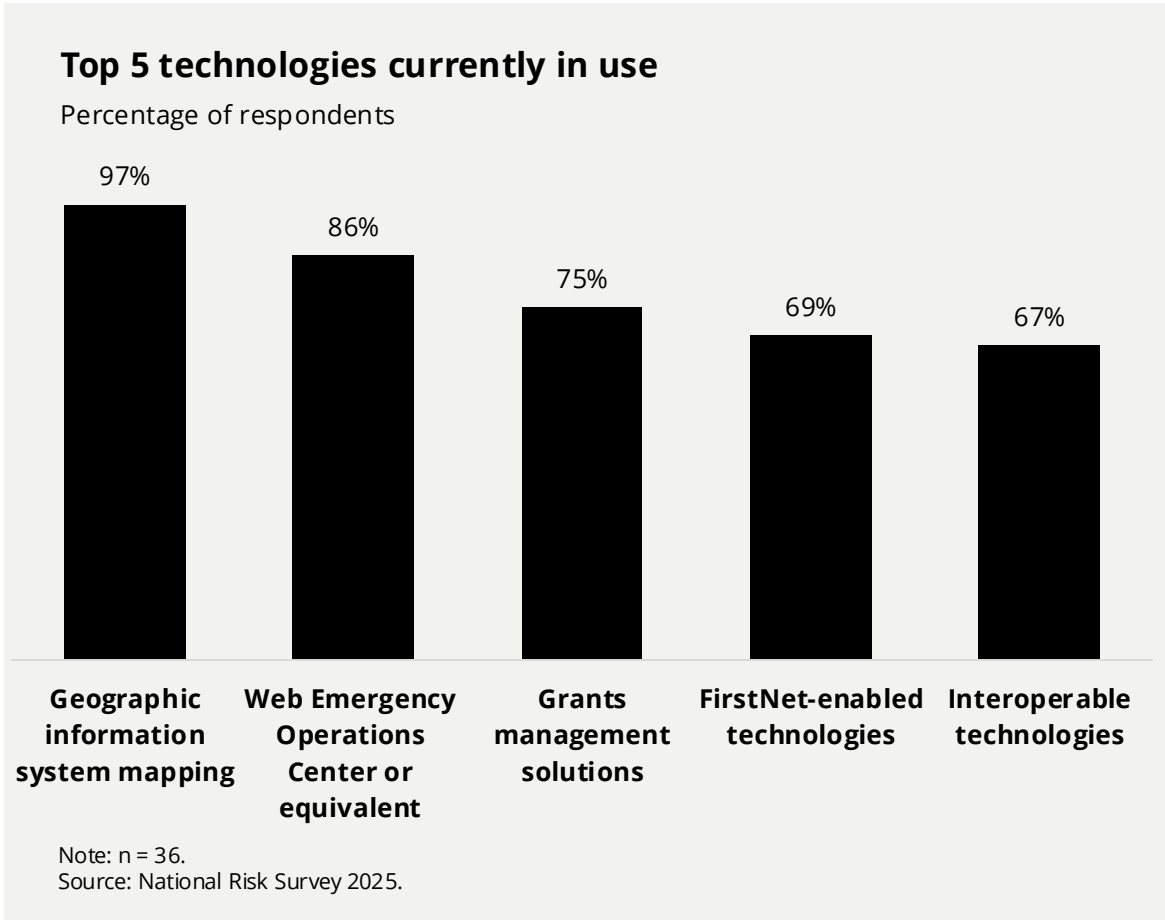
Percentage of respondents



Note: n = 36.
Source: National Risk Survey 2025.

There is a gap between the technologies currently in use and those that agencies would like to adopt

Survey respondents are interested in using AI and other technologies, but are not actively using them.



The majority of states want to invest more in technology, but lack the technical knowledge or budget

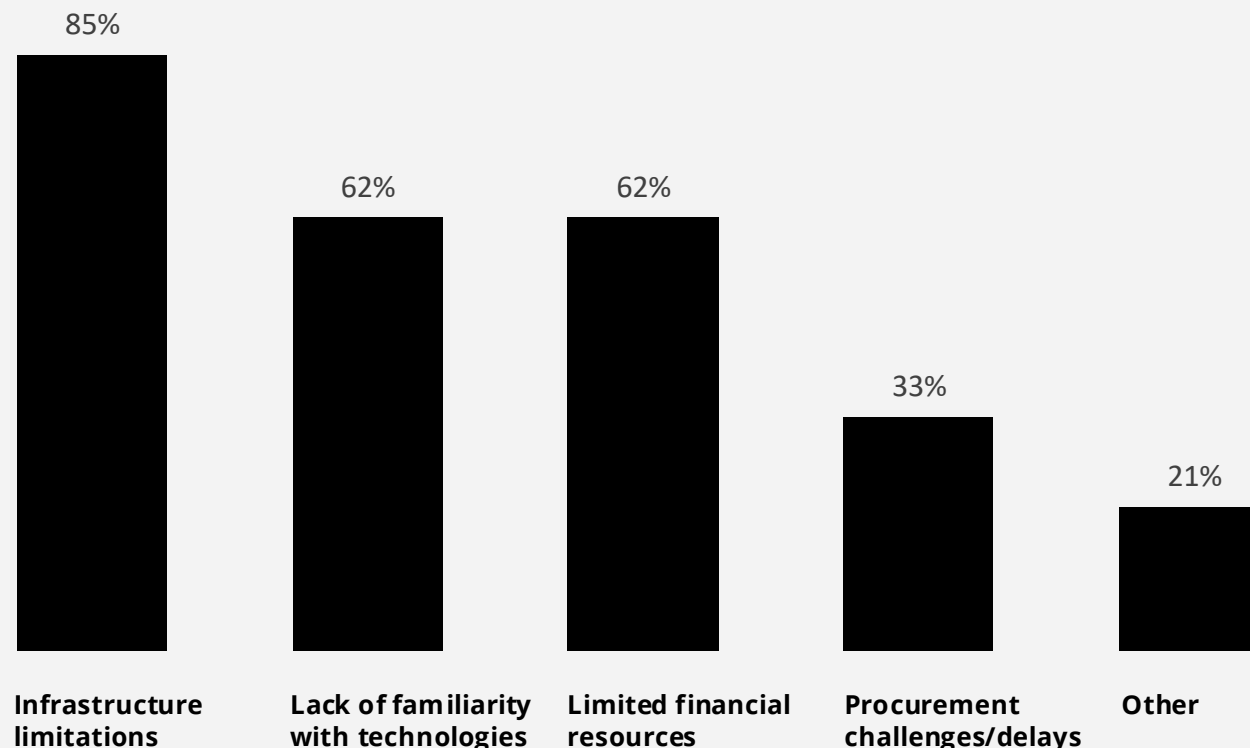
85%

of states cite infrastructure limitations as the most significant barrier to adopting new technologies. Lack of familiarity, limited financial resources, and procurement challenges round out the other primary pain points. Addressing these barriers is crucial for enhancing operational efficiency, improving coordination, and supporting more effective public safety outcomes.

Top 5 barriers to technology adoption for agencies

Respondents were asked to select all that apply

Percentage of respondents



Notes: n = 39. "Other" includes staff experience and understanding of technology adoption and use; lack of interoperability and the need for information to flow between the different programs used in emergency management; policy limitations at the state level; staff with the knowledge to leverage; IT security restrictions; skill gaps and specialized knowledge to implement and maintain innovative technologies; and resistance to change with concerns.

Source: National Risk Survey 2025.

**Time is not
currently
allocated to
preferred
activities**

**“That’s already right of boom—
it’s already happened, but the
question is how do we get left
of boom.”**

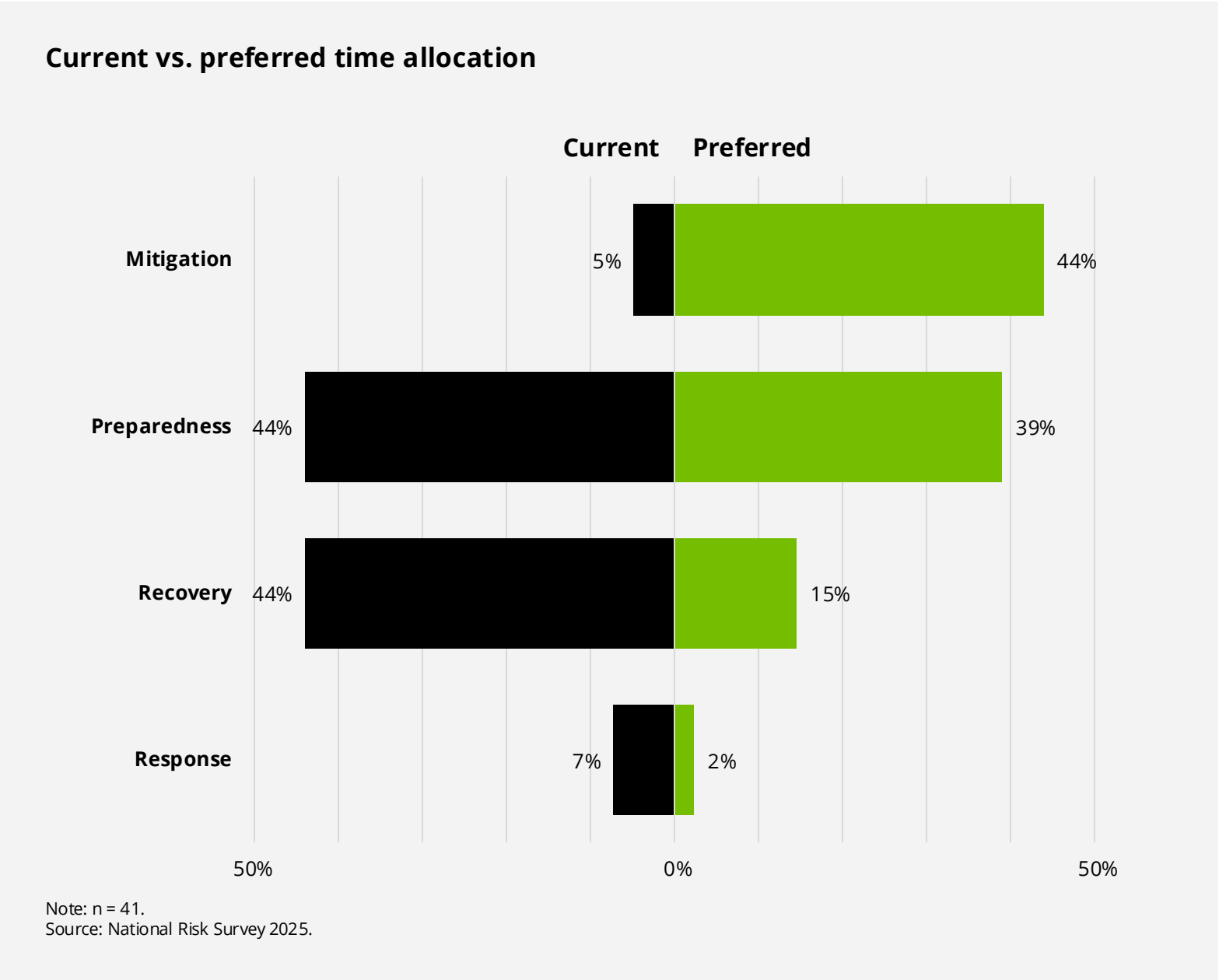
– A state emergency management director

Time is not currently allocated to preferred activities

While respondents would prefer to spend 44% of their time on mitigation, they currently spend 5%.

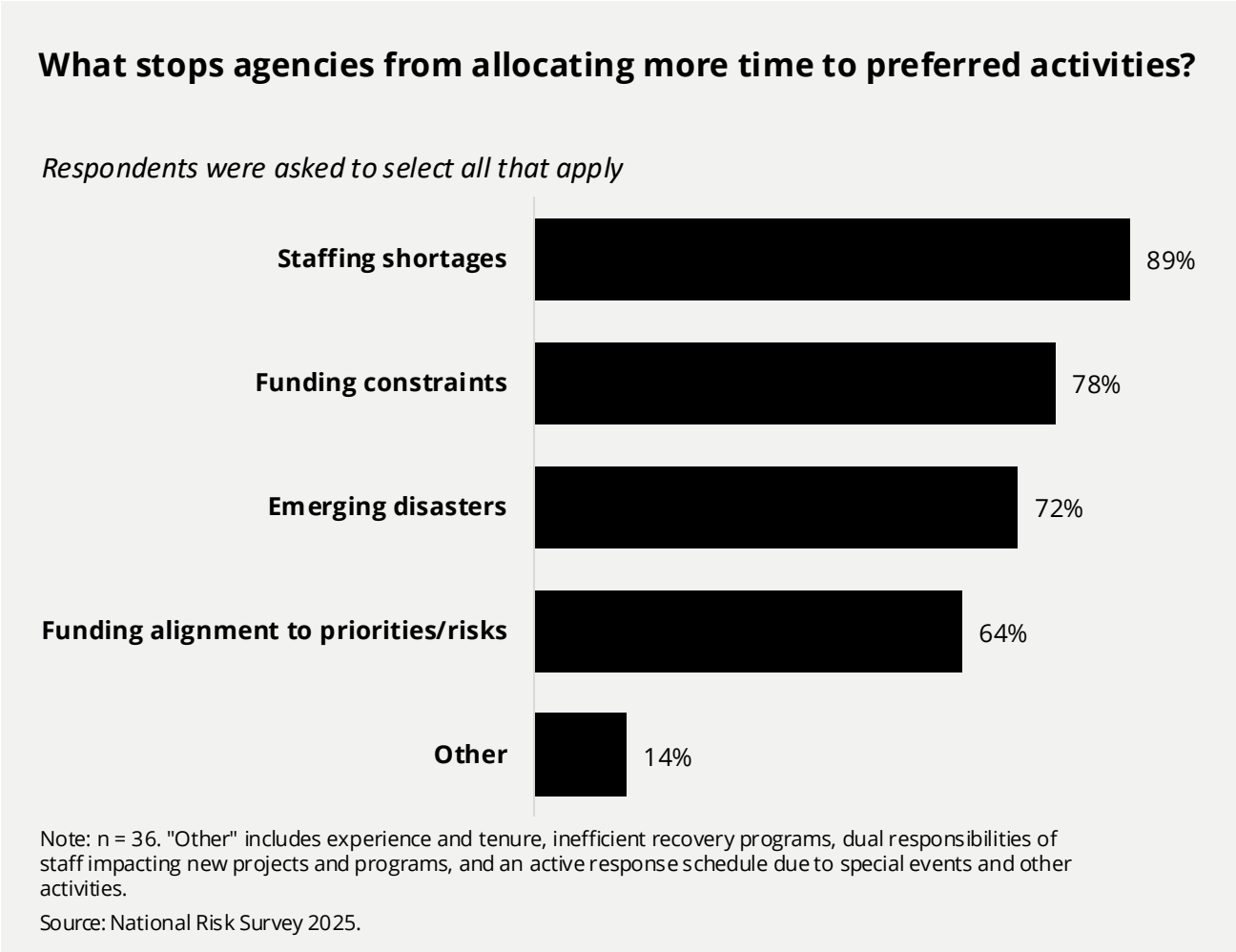
The survey reveals a significant disconnect between where emergency management directors currently spend their time and where they would prefer to focus. Currently, the majority of respondents' time is dedicated to preparedness and recovery efforts. Their preference would be to spend more time on mitigation as well as preparedness, recognizing the benefits and cost savings of these earlier interventions.¹

Source: ¹Federal Emergency Management Agency, "Natural hazard mitigation saves interim report," June 2018.



Top barriers to allocating time toward preferred activities include staffing shortages, funding constraints, and the impact of emerging disasters

Addressing these barriers, especially staffing shortages and funding constraints, could assist agencies in aligning their time with their preferred focus areas, particularly mitigation. This could lead to more effective and proactive practices and enhance community resilience and preparedness.



Conclusion

The evolving emergency management environment creates a new imperative for states to critically consider their future strategies. Recent guidance from the Department of Homeland Security and FEMA leaders, as well as the creation of the FEMA Review Council,¹ is fostering a renewed discussion about how the nation manages emergencies and the roles of federal, state, and local authorities. This study adds important insight to this dialogue.

The insight of this survey presents a picture of an interconnected set of challenges: The **expanding mandate** of emergency management agencies has stretched the available **funding** and **workforce**, resulting in a continual state of response. This makes it challenging for agencies to dedicate additional time to preferred areas like **mitigation and preparedness** or to invest in more fully leveraging advanced **technology**. These insights invite consideration of a set of strategic questions that can help inform forward-looking discussions on how states may evolve their approaches and capabilities.

Source: ¹United States Department of Homeland Security, "Federal Emergency Management Agency Review Council," Feb. 13, 2025.

Strategic questions to guide future thinking

- Given the varying financial exposures and risk profiles across different regions, how should the cost burden for emergency management be shared amongst stakeholders?
 - What should states prioritize, and how will they align resources, capabilities, and stakeholder support?
 - How are states going to build the workforce of the future if they take more responsibility across the emergency management life cycle?
 - What are the barriers to adopting advanced technologies that can help address today's evolving challenges and enhance efficiency in emergency management?
 - How can states address the barriers preventing them from taking on a more proactive approach to emergency management?
-

Methodology

The States of Readiness Survey was developed and administered by Deloitte in collaboration with the National Emergency Management Association (NEMA) and Columbia University's National Center for Disaster Preparedness.

The survey is intended to be conducted biannually and aims to provide a comprehensive understanding of how workforce, partnership, process, technology, funding, and other priorities impact the emergency management priorities of state and territorial agencies. The study moves beyond traditional risk assessments to contextualize these factors, helping us to better understand the significant risks that states are facing, how these risks are measured, and how limited resources are allocated based on the impact and likelihood of different hazards or threats. The report was based on 32 survey questions across six dimensions: workforce, partnership, process, technology, funding, and other priorities.

The survey was distributed to 55 directors of state and territory emergency management agencies across the NEMA's membership. This report reflects insights from 42 state emergency management directors and their staff, spanning all 10 Federal Emergency Management Agency regions. The survey was open from October 2024 through March 2025. The majority of responses were received in 2024, with final responses gathered until March 2025. The report was compiled from March 2025 through June 2025.

While the survey was distributed to all states, response rates may have been impacted by active response and recovery from emergencies during the survey period. In addition, Deloitte interviewed 14 state emergency management directors to gather additional qualitative input. This report presents a combined analysis of these surveys as well as the interviews.

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Ragini Basu is a leader in Deloitte's crisis and grant management practice, bringing over 25 years of experience in managing complex, high-impact projects across the nation. She is recognized for her extensive knowledge and experience in supporting states through large-scale catastrophic disasters and has led state and federally funded initiatives, including Federal Emergency Management Agency Public Assistance, Hazard Mitigation, the Bipartisan Infrastructure Law, Inflation Reduction Act, American Recovery and Reinvestment Act, Coronavirus Aid, Relief, and Economic Security Act, among others.

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About the National Emergency Management Association (NEMA)

Established in 1974, the NEMA is a nonpartisan, nonprofit 501(c)(3) association dedicated to enhancing public safety by improving the nation's ability to prepare for, respond to, and recover from all emergencies, disasters, and threats to our nation's security. The NEMA is the professional association of and for emergency management directors from all 50 states, eight US territories, and the District of Columbia.

About the National Center for Disaster Preparedness (NCDP)

The NCDP, Columbia Climate School, Columbia University, works to understand and improve the capacity to prepare for, respond to, and recover from disasters. The NCDP focuses on the readiness of governmental and nongovernmental systems, the complexities of population recovery, the power of community engagement, and the risks of human vulnerability.

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The Deloitte Center for Government Insights shares inspiring stories of government innovation, looking at what's behind the adoption of new technologies and management practices. We produce cutting-edge research that guides public officials without burying them in jargon and minutiae, crystalizing essential insights in an easy-to-absorb format. Through research, forums, and immersive workshops, our goal is to provide public officials, policy professionals, and members of the media with fresh insights that advance an understanding of what is possible in government transformation.



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