

ELG0288: Local Volunteer and Donations Management

Instructor Guide

Date Released: 06/2021



FEMA

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Unit 0A: Instructor Overview

Instructor Overview -

COURSE BACKGROUND

This 1½-day training will support local governments and their emergency management partners in preparing for, responding to, and recovering from disaster events at the local level.

The course is designed to strengthen the abilities of local jurisdictions to successfully prepare for and handle volunteer and donations management issues that may arise. The course content and activities may also serve as a template, thereby enhancing uniformity in addressing areas of donated unsolicited goods, unaffiliated volunteers, and undesignated cash.

This training also provides information regarding the State's volunteer and donations management responsibilities, which are designed to help build relationships between government and non-government organizations.

COURSE GOAL

To provide local emergency management personnel and voluntary agency representatives with the knowledge and skills necessary to develop and execute an effective volunteer and donations management program as well as develop a volunteer and donations management support annex.

Given these tools, the participants will be better equipped to prepare a program to effectively manage the masses of unaffiliated volunteers, unsolicited goods, and offers of undesignated cash donations that, if left uncoordinated and unmanaged, can interfere with disaster operations and cause a secondary disaster.

COURSE OBJECTIVES

After completing the course, participants will be ready to:

- Identify key organizations and individuals who have a role in managing unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.
- Identify specific agencies and organizations and how they collaborate to form a Volunteer and Donations Coordination Team (VDCT).
- Develop an effective public education and information structure to support the successful management of unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.
- Identify how to effectively manage the surge of unsolicited goods.
- Gather information from organizations, agencies, volunteers, media, and others for donations intelligence purposes.
- Facilitate the matching of unaffiliated volunteers with appropriate organizations or agencies during program implementation.
- List the planning considerations for cash donations.
- Incorporate technology needed to successfully manage information on unaffiliated volunteers and unsolicited goods.
- Relate volunteer and donations management program responsibilities to the planning components of the annex.

TARGET AUDIENCE

This course is designed for local-level staffs to include:

- Local Volunteer/Donations Coordinator
- Coordinator's Alternate
- Leading stakeholders of voluntary organizations
- State/local VOAD (Voluntary Organizations Active in Disaster) Chair or Designee
- Public Information Officer or Liaison
- Program Functional Leads
- Government-Private Sector Liaison

INSTRUCTOR QUALIFICATIONS

Lead Instructors will be chosen based on a combination of their Volunteer and Donations Management training, qualifications, and experience. Lead Instructors (3)

- All instructors to be approved by the State Volunteer/Donations Coordinator, in concert with the State Training Officer, prior to course offering
- Composition of instructors: one individual from State, one individual from a local jurisdiction, and one individual from non-profit sector
- Training experience using adult learning principles
- Positive attitude
- Enthusiasm about subject
- Good communication skills

Subject Area Instructors (Guest Presenters; Panelists)

- Expertise in subject matter
- Understand expectations of course objectives
- Good communication skills
- Engaging speaker Areas of Subject Matter Expertise
- Overview of local Volunteer and Donations Management

COURSE METHODOLOGY

Instructional methodology will include interactive lectures, group discussions, practical activities using disaster scenarios, daily reviews and assessments, and optional Web demonstration on information management used by the local jurisdiction.

COURSE DEPLOYMENT

This course is designed for local delivery or at the State to expedite the training of personnel within the same area. The ideal class size is no more than 32 participants. This will ensure maximum interaction and relationship building.

COURSE DURATION

This course is designed for 1½ days of instruction.

PRE-REQUISITES

Recommended:

1. IS-288, The Role of Voluntary Agencies in Emergency Management
2. IS-700.a, National Incident Management System (NIMS), An Introduction
3. IS-100.b, Introduction to the Incident Command System (ICS), ICS-100

COURSE REFERENCES

- *Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions*, published by Points of Light Institute, HandsOn Network, NVOAD, and UPS.
- <https://www.hsd1.org/c/lis-in-the-hsd1/>
- When Disaster Strikes ... How to Donate or Volunteer Successfully! FEMA L 127, August 2007.

ICONS



Video icon

Video



Easel icon

Easel Chart



Key Points icon



Instructor Note icon

Instructor
Note



Handout icon



Activity icon

Activity



Discussion Question icon

Discussion
Question



Summary Transition icon



Student Manual icon

Student
Manual



Time-Saving Tip icon

INSTRUCTOR PREPARATION

Course Materials:

- Instructor Guide, Student Manual
- Pre-Course and Post-Course Assessments; Answer Sheets and Answer Keys

Equipment:

- Laptop/desktop computer
- LCD Projector
- Tables/chairs
- Easels/pads, paper and pencils/markers, Post-it notes
- Classroom (adequate for learning environment)

TO DO BEFORE CLASS

Before Teaching Intro & Welcome

- Make copies of the pre-course assessment and answer sheet for each participant.
- Bring index cards (if you do the Card Activity) or a cup (if you do the Acronym Game). See page IG 6 for a description of these potential activities.
- Collect materials for a literature table; articles on local disasters, reference materials you think will be helpful, etc. Encourage participants to bring materials as well.

- Ensure you have extra copies of local Volunteer and Donations Management Support Annexes so that every participant in class will have a copy (if he or she did not bring one for their own community).
- Make a copy of the State Volunteer and Donations Management Support Annex for each participant. During the course overview, everyone will receive a copy of the State Annex and receive a copy or take out his/her copy of the Local Annex.

Before Teaching Unit 1

- If the FEMA Regional VAL is available, it would be good to have him or her instruct Unit 1.
- Invite the FEMA Regional VAL, the State VAL or Donations Management Coordinator, and any representatives from local jurisdictions with well-written Local Plans/Annexes to participate during the panel discussion at the end of Unit 1. Each should be familiar with the State's Volunteer and Donations Management Support Annex and its relationship to planning and operations in the local jurisdictions.
- Make sure you have enough copies of *Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions* for each participant. It can be found at <http://www.fema.gov/donate>. Go to Resources.
- Find out if the county has any Memorandums of Understanding with other counties or voluntary organizations to provide volunteer and donations management assistance during a disaster. If so, bring a copy for each participant.
- Panel Discussion
 - Identify three or four major organizations represented in the class.
 - Locate one participant from each organization and ask him/her to participate in a panel discussion at the end of Unit 1.
 - Questions for the panel discussion are:
 - Does your organization have a plan/annex that specifies how you will handle spontaneous volunteers and undesignated donations? If so, please describe how it has worked in the past.
 - Does your plan/annex support volunteer and donations management at the local jurisdictional level?
 - Do you participate in the area Volunteer and Donations Coordination Team? If so, describe your role. How would you like to change your role so you are more effective?
 - What is one particularly successful operation in which your activities helped the overall process of volunteer and donations management in this area?
 - What does your agency or organization do on a local, county, or tribal level during all functions of emergency management? How do we collaborate with each other to work on these activities?

Before Teaching Unit 3

- Collect any local or tribal Press Releases, Newsletters, Public Service Announcements, or flyers you have been able to locate. If possible, make enough copies for the participants.
- Make copies of the "When Disaster Strikes" brochure, FEMA L-217. They are available for downloading at <http://www.fema.gov/donations>.

- Become familiar with social media used locally, as well as policies, if you are not already knowledgeable.
- Read the scenario at the end of Unit 3 and make sure it can be adapted to your community. If not, develop one for Unit 3 that can be used in Units 4–6 as well. Your State Training or Exercise Officer may have example scenarios that can be adjusted for use in this course.

Before Teaching Unit 5

- Research and have information available for participants about the protection against liabilities for organizations and volunteers in your State.

Before Teaching Unit 7

- If your State uses its own NDMN portal for locals, you should demonstrate the software and discuss its use in your jurisdiction.
- Find out what computer systems are used by participants in the class. If it makes sense, ensure that you have a copy of that software that you can demonstrate to those who are not using that system.
- Make copies of the post-course assessment and answer sheet for each participant.

Before Teaching Unit 8

- Ensure everyone has brought his or her copy of the Local Annex to class. Point out that they have been reviewing these annexes all through the course.
- Ensure you have enough copies of the other Local Annexes that you want to use for comparison.

METHODOLOGY

Table Groups

This course is designed such that instructors ensure that each table possesses a diversity of participants. This can be left up to the lead instructor in terms of organizing this process – whether organizing tables beforehand or moving participants before class initiates. Overall, this will set the stage for more balanced and interactive learning.

Course Welcome

The traditional welcome and introduction of trainers and course participants kicks off the course in order to cover adequately the scope of the course and lay a foundation for its effective delivery. Course references should be a key part of each participant's course materials. Accordingly, instructors should direct attention to these materials and encourage participants to reference them throughout the course.

Sign-In Sheet for Participants

In addition to having each participant initial attendance for each day, you can use the information each person (willingly) provides to develop a course roster. Having participants stay in touch after the course is an invaluable resource for class members.

COURSE OUTLINE

DAY ONE	TIME
Course Introduction, Welcome, Administrative Information, Participant Introductions, and Pre-Course Assessment Course Goal and Objectives	1 hour
Unit 1: Volunteer and Donations Strategies and Management Panel Discussion	1 ½ hours
Unit 2: Collaboration and Partnership	1 ½ hours
Unit 3: Managing Public Education and Information	1 ½ hours
Unit 4: Managing Unsolicited Donated Goods	1 hour
DAY TWO	
Review, Questions, and Announcements	¼ hour
Unit 5: Managing Unaffiliated Volunteers	¾ hour
Unit 6: Managing Undesignated Cash	¾ hour
Unit 7: Information Management	1 hour
Unit 8: Local Plans	1 ½ hours

LOCAL VOLUNTEER AND DONATIONS TRAINING SIGN-IN SHEET*

	Name	Organization	Email Address	Phone Number	Day 1	Day 2
1.						
2.						

	Name	Organization	Email Address	Phone Number	Day 1	Day 2
3.						
4.						
5.						
6.						
7.						
8.						
9.						
10.						
11.						
12.						
13.						

LOCAL VOLUNTEER AND DONATIONS TRAINING SIGN-IN SHEET*

Name		Organization	Email Address	Phone Number	Day 1	Day 2
14.						
15.						
16.						
17.						

Name		Organization	Email Address	Phone Number	Day 1	Day 2
18.						
19.						
20.						
21.						
22.						
23.						
24.						
25.						
26.						
27.						

LOCAL VOLUNTEER AND DONATIONS TRAINING SIGN-IN SHEET*

Name		Organization	Email Address	Phone Number	Day 1	Day 2
28.						
29.						
30.						
31.						
32.						

Name		Organization	Email Address	Phone Number	Day 1	Day 2
33.						
34.						
35.						
36.						
37.						
38.						
39.						
40.						

Unit 0B: Course Introduction and Welcome

Introduction and Welcome

Estimated Time: 1 hour

Introduction

During this unit, we will get to know one another, have an overview of the course, and learn about the course materials. We'll also take a pre-course assessment to help us gauge your knowledge.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Identify the instructors and recognize other participants in the classroom.
2. Associate the course objectives with units in the course schedule.
3. Identify course materials and describe how they will be used during the course.
4. Answer questions on the pre-course assessment.

Scope

- Welcome
- Administrative Information
- Unit Objectives
- Participant Introductions
- Course Materials
- Course Goal and Objectives
- Pre-Course Assessment

Before Teaching This Unit

- Make copies of the pre-course assessment and answer sheet for each participant.
- Bring index cards (if you do the Card Activity) or a cup (if you do the Acronym Game). See IG page 6 for a description of these potential activities.
- Collect materials for a literature table; articles on local disasters, reference materials you think will be helpful, etc. Encourage participants to bring materials as well.
- Ensure you have extra copies of local Volunteer and Donations Management Support Annexes so that every participant in class will have a copy (if he or she did not bring one for their own community).
- Make a copy of the State Volunteer and Donations Management Support Annex for each participant. During the course overview, everyone will receive a copy of the State Annex and receive a copy or take out his/her copy of the Local Annex.

Methodology

Interactive discussion and introductions

Time Plan	
Suggested below are anticipated times for each section in this unit:	

Time Plan	
Welcome	3 minutes
Administrative Information	5 minutes
Unit Objectives	2 minutes
Participant Introductions	25 minutes
Course Materials	5 minutes
Course Goal and Objectives	5 minutes
Pre-Course Assessment	15 minutes
TOTAL UNIT	60 minutes

Visual 1: Introduction and Welcome



Instructor
Note

Show the title visual as you introduce this unit.

Welcome participants to the course.

Take time to introduce yourself and any Guest Speakers that will be contributing to the course.

Visual 2: Administrative Information

- Logistics
- Facilities
- Classroom Behaviors
- Course Evaluations
- Pre-Course and Post-Course Assessments
- Announcements



Instructor
Note

Use visual as a guide to cover the topics.

Explain that some participants may be very experienced and knowledgeable about volunteer and donations management, while others may be new to the process. However, during this course, we hope to draw upon the experienced people to help the less experienced and enrich the course for everyone.



Easel Chart

Record any Parking Lot issues on an easel—ensuring that there is class consensus.

Point out the Fire Exit and any other safety issues.

Clarify arrangements and times for class, lunch, and breaks.

Ask participants to tell you what behaviors they want to see during class and what they do not want to see.

Ask participants if they have any questions.

Visual 3: Objectives

1. Identify the instructors and recognize other participants in the classroom.
2. Associate the course objectives with units in the course schedule.
3. Identify course materials and describe how they will be used during the course.
4. Answer questions on the pre-course assessment.

Visual 4: Participant Introductions

- Name
- Organization
- Roles/Responsibilities
- Expectations



Instructor
Note

Ask participants to introduce one other person following ice breaker instructions from the lead instructor.

Ask participants to be brief and focus on information requested on the visual only. Visual should be used to keep participants focused.



Easel Chart

Use an easel to record the expectations that each participant has regarding the course.

Tell participants that the expectations will be revisited at the end of class to determine if/how they were met.

Post list of expectations on the wall for participants to see throughout the course.

OPTIONS: You may use the “card activity” or the “acronym game” to liven up the class. Instructions are given below.

Card Activity

Ask each person (including instructors who will be there the whole time) to write one interesting thing on an index card that no one in class knows about him or her. (It could be a special skill or interest, whatever they want as long as it is clean!) Participants should not write their name on the card and should drop them face down in a box during the first break.

Then, right at the end of every break, when the class should be back, have one participant select a card (from those in the box). That person reads the card and the rest of the class tries to guess whose card it is. After a few tries, the person who wrote the card claims it, taking a brief time to explain it, if needed.

Acronym Game

Put a cup at the front of the class. State that it is their job to catch you, as instructors, and the rest of the participants using acronyms without first explaining each of the words. Every time an instructor is caught, he or she has to put a dollar bill in the cup. Every time a participant is caught, he or she owes a quarter. (While the game is fun, it also emphasizes how often we talk using acronyms that make it difficult for real communication to occur.)

Visual 5: Course Materials

- Student Manual
 - Appendices
- State and local plans
- Reference materials



Discuss how the course materials are used: Student Manual, including Appendices, and State and Local Plans. Show copies of the course materials as you review them.

Instructor
Note

Remind participants that a literature table is available for additional reference materials.

Student Manual



Information includes: PowerPoint presentation, class activities and scenarios, and appendices at the end of each unit.

Reference Materials

- Instructor distributes, when applicable.
 - Contain supplementary training information.

Visual 6: Course Goal

To provide local emergency management personnel and voluntary agency representatives with the knowledge and skills necessary to develop and execute an effective volunteer and donations management program as well as develop a volunteer and donations management support annex

Visual 7: Course Objectives

- Identify key organizations and individuals who have a role in managing unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.
- Identify specific agencies and organizations and how they collaborate to form a Volunteer and Donations Coordination Team (VDCT).
- Develop an effective public education and information structure to support the successful management of unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.

Visual 8: Course Objectives

- Identify key organizations and individuals who have a role in managing unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.
- Identify specific agencies and organizations and how they collaborate to form a Volunteer and Donations Coordination Team (VDCT).
- Develop an effective public education and information structure to support the successful management of unaffiliated volunteers, unsolicited goods, and undesignated cash donations in disasters.

Visual 9: Course Objectives

- List the planning considerations for cash donations.
- Incorporate technology needed to manage successfully information on unaffiliated volunteers and unsolicited goods.
- Relate volunteer and donations management program responsibilities to the planning components of the annex.



Instructor
Note

Briefly **review** the Course Goal and Objectives and how they will be met during the course. Do not read.

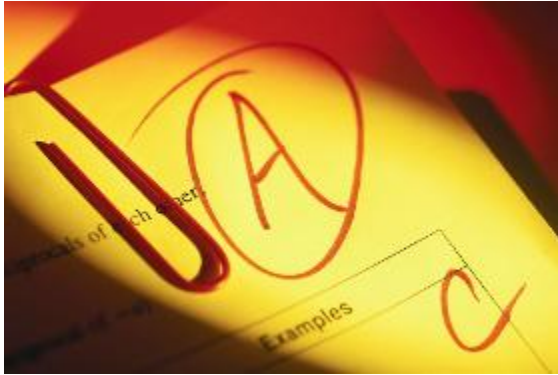
Hand each participant a copy of the State Volunteer and Donations Management Support Annex and a copy of a local Annex if they did not bring their own.

Ask participants if they have any questions.



- At the end of the next unit, we will have a panel discussion that reviews the relationship of the State Annex to your local plan or annex.
- At the end of each unit, we will review your annex (or the local annex you have been given) to see what the annex states about the content we have just reviewed.
- We will also discuss several questions related to the contents of your annex and you will have the opportunity to make notes about improvements.
- At the end of the course, we will spend more time on your annex and take the time to compare it for ways to make it more efficient.

Visual 10: Pre-Course Assessment



Instructor
Note

Hand out the assessment and the answer sheet, emphasizing to participants to put their responses on the answer sheet.



- This assessment is to help us get a baseline of your knowledge so we can tailor the course to your needs. It will also give you an idea of what you will learn in the class, as well as the types of questions that will be on the post-course assessment.
- The numbers by each question refer to the unit objective covered by that particular question.

Unit 1: Volunteer and Donations Strategies and Management

Unit 1: Volunteer and Donations Strategies and Management

Estimated Time: 1.5 hours

Introduction

In this unit, we will discuss events leading to the formation of a strategy for working with donations and volunteers at the local level. Next, we will explore how the national strategies for donations and volunteer management relate to your jurisdiction. We'll examine the functions of emergency management and how they relate to volunteer and donations management. Finally, we will have a panel discussing your State's Volunteer and Donations Management Support Annex and how it supports the work you do following a disaster.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Identify the key historical events in Volunteer and Donations Management.
2. Relate the national strategies for managing unsolicited donations, unaffiliated volunteers, and undesignated cash to events at the local and State levels.
3. Explain the continuous nature of emergency management functions.
4. Describe specific ways the State Volunteer and Donations Management Plan supports Local Plans and operations.

Scope

- Volunteer and Donations Management Timeline
- Relationship of the National Volunteer and Donations Management Strategy to local and State events
- Functions of Emergency Management
- Panel and Plan Review

Methodology

- Interactive discussion
- Small group activity
- Facilitated panel discussion

Before Teaching This Unit

- If the FEMA Regional VAL is available, it would be good to have him or her instruct this unit.
- Make sure you have enough copies of *Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions* for each participant. It can be found at <http://www.fema.gov/donate>. Go to Resources.
- Find out if the county has any Memorandums of Understanding with other counties or voluntary organizations to provide volunteer and donations management assistance during a disaster. If so, bring a copy for each participant.
- Panel Discussion

- Invite the State VAL or Donations Management Coordinator, and any representatives from voluntary organizations and local jurisdictions with well-written Local Plans/Annexes to participate during the panel discussion at the end of this unit. Each should be familiar with the State's Volunteer and Donations Management Support Annex and its relationship to planning and operations in the local jurisdictions.
- Questions for the panel discussion are:
 - Does your organization have a plan/annex that specifies how you will handle spontaneous volunteers and undesignated donations? If so, please describe how it has worked in the past.
 - Does your plan/annex support volunteer and donations management at the local jurisdictional level?
 - Do you participate in the area Volunteer and Donations Coordination Team? If so, describe your role. How would you like to change your role so you are more effective?
 - What is one particularly successful operation in which your activities helped the overall process of volunteer and donations management in this area?
 - What does your agency or organization do on a local, county, or Tribal level during all functions of emergency management? How do we collaborate with each other to work on these activities?
 - What differences have you noticed between disasters that have been declared by the State or FEMA and non-declared disasters.

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Volunteer and Donations Management Timeline	5 minutes
Relationship of the National Volunteer and Donations Management Strategy to Local/State Events	35 minutes
Functions of Emergency Management	5 minutes
Panel and Plan Review	40 minutes
Unit Summary	3 minutes
TOTAL UNIT	90 minutes

Visual 1: Volunteer and Donations Strategies and Management



Introduce unit.

Instructor
Note

Visual 2: Objectives

1. Identify the key historical events in Volunteer and Donations Management.
2. Relate the national strategies for managing unsolicited donations, unaffiliated volunteers, and undesignated cash to events at the local and State levels.

Visual 3: Objectives

3. Explain the continuous nature of emergency management functions.
4. Describe specific ways the State Volunteer and Donations Management Plan supports Local Plans and operations.



Identify the unit objectives and ***point out*** how each will be achieved.

Instructor
Note

Visual 4: Timeline

- 1989: Hurricane Hugo
- 1992: Hurricane Andrew
- 1993: FEMA creates committee to address the need for donations management
- 2001: September 11th disaster
 - Heavy use of EMAC
- 2004: Publication of Managing Spontaneous Volunteers in Times of Disaster
 - Updated in 2008
- 2005: Hurricane Katrina
- 2006/2007: National Donations Management Network is developed



Expand on the points on the visual as they are just a synopsis. **Explain** the detail is in their Student Manuals.

Instructor
Note



- 1989—Hurricane Hugo—interagency coordination and planning started with Hugo.
- 1992—Hurricane Andrew—
 - Operation highlighted the need for plans to address the issue of unsolicited donated goods and unaffiliated volunteers.
 - People across the Nation donated tons of materials that were not appropriate for a hurricane in Florida.
- 1993—FEMA created a committee to address the need for donations management.
 - 1994—First State donations training occurred at EMI.
- 1995—Oklahoma City Bombing—assembled a team to determine what donations needs there might be. Specific donation problems included:
 - Trucks dropping off materials on an hourly basis but no one knew if they were donations or just being loaned.
- September 11th—Heavy use of FEMA-trained State Donations Coordinators through the Emergency Management Assistance Compact (EMAC). EMAC is a legal mechanism to provide staffing resources from one State to help another.



Lead a discussion with participants about any agreements they have with neighboring counties and/or voluntary organizations about providing volunteer and/or donations management assistance during disasters.

Instructor
Note



- 2002—The UPS Foundation, Points of Light Foundation, and FEMA co-host the National Leadership Forum on Disaster Volunteerism, where more than 90 stakeholders met to begin development of guidance on managing unaffiliated volunteers.
- 2004—UPS Foundation, Points of Light Foundation, and FEMA publish “Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions.”
- 2005—Hurricane Katrina underscores the need for a more centralized information management system for managing unsolicited donated goods and unaffiliated volunteers.
- 2006/2007—FEMA works with AidMatrix Foundation to develop the National Donations Management Network (NDMN), a Web-based information management tool, for States and voluntary agencies for unsolicited donations and unaffiliated volunteers.



Instructor
Note

If asked, **point out** that NDMN is not used by officials at the local level. **Emphasize** that volunteer and donations management improves with each step in the timeline. As lessons are learned, strategies are developed, training is implemented, and is then practiced during events.

Visual 5: National Management Strategies

- Majority of this course is about:
 - Unsolicited donated goods
 - Unaffiliated volunteers
 - Undesignated cash
- The National Management Strategies are National Incident Management System (NIMS) compliant
 - And they respect the very sensitive donor relationships that may exist between donors and voluntary agencies

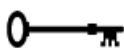


- **A majority of this course is about unsolicited donated goods and unaffiliated volunteers and undesignated cash.**
- The National Management Strategies are National Incident Management System (NIMS) compliant.
 - There is no interest in disturbing the very sensitive donor relationships that may exist between donors and voluntary agencies.
- The National Donations Management Strategy includes 10 points that set the foundation for the entire subject of managing unsolicited donated goods.
 - Because of the broad-based and inclusive approach taken by FEMA in 1993 in the development of these points, there is still a sense of ownership of these main points by all involved in Donations Management.



- Similar to the donations strategy, but developed more recently, are the Principles of Managing Unaffiliated Volunteers.

Hand out Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions.



- Managing Spontaneous Volunteers was developed in partnership with FEMA, the Points of Light Foundation, and the Volunteer Management Committee of National VOAD, through a grant from the UPS Foundation. The publication is offered as a basis for developing a strategy on working with unaffiliated volunteers and is based on an analysis of effective models.

Visual 6: Relating the Strategies to You



Activity

Relating the Strategies to You

1. Read the National Strategy assigned to your group.
2. Answer the questions and summarize on chart paper.
3. Be prepared to report to the class if your group is selected.

You have 15 minutes to work.



Purpose: To explore the relationship of the national strategies to the types of events you have faced, or will face, on the local, county, or tribal level.



Instructor Note

- **Assign** half the table groups to the National Donations Management Strategy (IG 1-12, SM 1-8) and half to the National Volunteer Management Strategy (IG 1-14, SM 1-10).
- **Ask** them to read the instructions in their SM.



Easel Chart

Directions:

1. Each person in the group should read the assigned strategy.
2. Working with other members of your group, discuss the following questions:
 - Were any of the elements or principles a surprise to you or unclear?
 - Which elements or principles has your jurisdiction(s) already taken into account:

- During preparedness activities?
 - In plans?
 - Informally?
 - During response activities?
- 3. Record the key points of your answers on the easel and be prepared to give a 2- to 3-minute report to the class.

Debriefing: *Walk around* while the groups are working so you can select one group to report on the donations elements and one on the principles for managing volunteers.

As each group reports, make appropriate comments to ground the answers in your experience.

Emphasize that every disaster is different in its effects: whom the disaster affects, how they are affected, what is donated, etc. So what worked the last time with the same type of disaster might not work this time.

After each report, **ask** if any of the other groups have key additions or questions.

10 Principles of National Donations Management Strategy

1. **DONATIONS ACTIVITIES MAY BEGIN BEFORE A DISASTER DECLARATION:** Donations and volunteers may flow into a disaster area immediately after a disaster. It is imperative that efforts are made to coordinate these early efforts to prevent difficult problems and misunderstandings later. Donations planning, coordination, and management are necessary to avoid the chaos, waste of time, and effort that large shipments of undesignated goods can cause. This is also necessary toward addressing spontaneous, unaffiliated volunteers who often arrive on-site at a disaster ready to help. Because they are not associated with any part of the existing emergency management response system, their offers of help are often underutilized and even problematic to professional responders.
2. **DONATIONS MANAGEMENT SHOULD ADDRESS UNDESIGNATED GOODS AND SPONTANEOUS VOLUNTEERS:** State and Federal donations management concerns and efforts are the **unsolicited or undesignated goods** and **spontaneous or convergent volunteers**. Designated goods and services are not addressed by the national strategy; they are managed by voluntary agencies, as designated goods are part of a voluntary organization's supply line and designated volunteers are affiliated with an organization. Spontaneous volunteer efforts should be carefully monitored to ensure that there are no health or safety issues associated with the volunteer services.
3. **SHIPMENT OF DESIGNATED GOODS MAY BE AFFECTED BY STATE POLICIES:** During a catastrophic disaster, the State may set policies that affect the transportation of all vehicles including shipments of designated donated goods. These policies should facilitate, and not interfere with, the shipment of designated goods.
4. **STATE AND LOCAL GOVERNMENTS ARE IN CHARGE OF DONATIONS OPERATIONS:** The government should address critical issues, such as what procedures should be established at weigh stations, toll booths, and other points of entry. The

government also should address developing and disseminating a message to the public regarding donated goods and volunteer services.

5. **FEDERAL GOVERNMENT AND NATIONAL VOLUNTARY ORGANIZATIONS ACTIVE IN DISASTER (NVOAD) HAVE SUPPORT ROLES:** NVOAD is a coalition of disaster relief agencies in the United States founded in 1969 after Hurricane Camille. Its mission is to foster cooperation, coordination, collaboration, and communication among voluntary agencies. It provides guidance to Voluntary Organizations Active in Disaster (VOAD), a State-level coalition of disaster relief agencies. The NVOAD works together with FEMA in a supporting role to State and local governments and State VOADs.
6. **STATE SHOULD MAKE FULL USE OF EXISTING VOLUNTARY AGENCY CAPABILITIES:** State and local donations management personnel should be very familiar with the strengths and interests of the voluntary agencies in their area. Disaster volunteer agencies, community-based organizations, and other non-governmental organizations have a wide variety of abilities that can be used during a disaster. Experienced voluntary agencies are often the best judges of what donated goods and volunteer services may be needed in the disaster area. Voluntary agencies are very concerned with making full use of potential donated goods and services and in developing a good rapport with donors, in case of future disasters.
7. **USE A FLEXIBLE STRATEGY:** Flexibility must always be used in disaster operations. There is no single correct way to manage unsolicited goods and spontaneous volunteers for all disasters. The approach taken will depend on the size of the disaster and the kinds of needs in the affected community. Other factors determining the appropriate approach will depend on the types of working relationships and agreements that are made between government emergency management personnel and voluntary agencies prior to a disaster.
8. **USE A TEAM APPROACH:** While the government is responsible for certain critical issues, the leading voluntary agency representatives are actively involved in the day-to-day operations.
9. **CASH DONATIONS TO VOLUNTARY AGENCIES ARE PREFERRED:** Cash donations to the voluntary agencies experienced in disaster relief help the agencies purchase precisely what the affected community needs, such as food items for the food bank. Cash donations to voluntary agencies help the local economy affected by the disaster because the money is spent in the local area. Cash donations also eliminate the difficult transportation and logistics requirements necessary for the donation of goods.
10. **INFORMATION MANAGEMENT IS ESSENTIAL:** During a large-scale or catastrophic disaster, several thousand calls to a phone bank (hotline) can be anticipated. A phone bank is the backbone of a successful donations management operation. The public should know where to call to discuss and coordinate their offers before they collect and send goods and volunteers into the disaster area. A volunteer and donations phone bank must be adequately staffed to give the caller accurate and timely information about the need for donations of goods and volunteers.

10 Principles of Managing Unaffiliated Volunteers

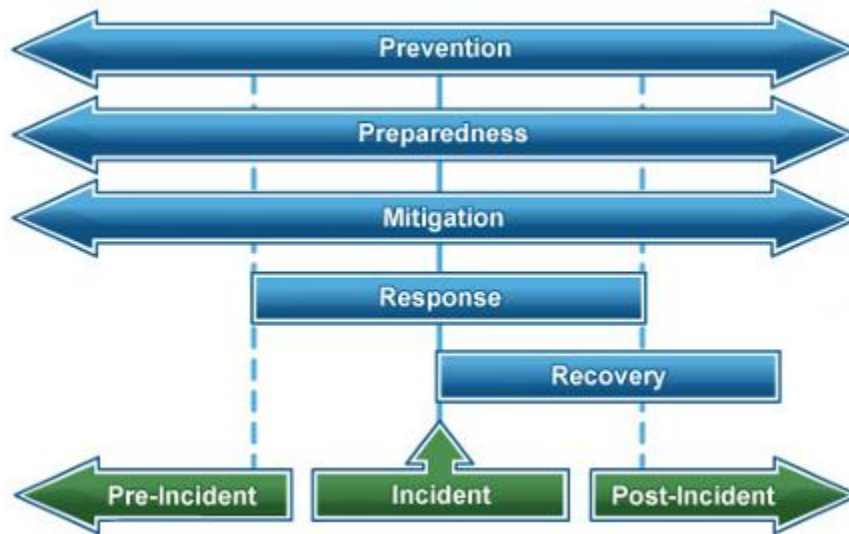
1. **VOLUNTEERING AND COMMUNITY LIFE:** Volunteering is a valuable part of every healthy community. Volunteers come from all segments of society and often provide essential services. Everyone has the potential to contribute strength and resources in times of emergency.
2. **THE VALUE OF AFFILIATION:** Ideally, all volunteers should be affiliated with an established organization and trained for specific disaster response activities. However, the spontaneous nature of individual volunteering is inevitable; therefore it must be anticipated, planned for, and managed.
3. **VOLUNTEER INVOLVEMENT IN THE FOUR PHASES:** There are valuable and appropriate roles for unaffiliated spontaneous volunteers in mitigation, preparedness, response, and recovery – as well as in other areas of community need. The response phase provides an opportunity to direct volunteers toward longer-term affiliation and community involvement.
4. **MANAGEMENT SYSTEMS:** Volunteers are a valuable resource when they are trained, assigned, and supervised within established emergency management systems. Similar to donations management, an essential element of every emergency management plan is the clear designation of responsibility for the on-site coordination of unaffiliated volunteers.
5. **SHARED RESPONSIBILITY:** The mobilization, management, and support of volunteers is primarily a responsibility of local government and nonprofit sector agencies, with support from the State level. Specialized planning, information sharing, and a management structure are necessary to coordinate efforts and maximize the benefits of volunteer involvement.
6. **VOLUNTEER EXPECTATIONS:** Volunteers are successful participants in emergency management systems when they are flexible, self-sufficient, aware of risks, and willing to be coordinated by local emergency management experts. Volunteers must accept the obligation to “do no harm.”
7. **THE IMPACT ON VOLUNTEERS:** The priority of volunteer activity is assistance to others. When this spontaneous activity is well managed, it also positively affects the volunteers themselves and thus contributes to the healing process of both individuals and the larger community.
8. **BUILD ON EXISTING CAPACITY:** All communities include individuals and organizations that know how to mobilize and involve volunteers effectively. Emergency management experts and VOAD partners are encouraged to identify and utilize all existing capacity for integrating unaffiliated volunteers.
9. **INFORMATION MANAGEMENT:** Clear, consistent, and timely communication is essential to successful management of unaffiliated volunteers. A variety of opportunities and messages should be utilized in order to educate the public, minimize confusion, and clarify expectations.
10. **CONSISTENT TERMINOLOGY:** When referring to volunteer involvement in emergency management, it is helpful to use consistent terminology. The following terms and definitions are recommended:

Affiliated volunteers are attached to a recognized voluntary or nonprofit organization and are trained for specific disaster response activities. Their relationship with the organization precedes

the immediate disaster, and they are invited by that organization to become involved in a particular aspect of emergency management.

Unaffiliated volunteers are not part of a recognized voluntary agency and often have no formal training in emergency response. They are not officially invited to become involved but are motivated by a sudden desire to help others in times of trouble. They come with a variety of skills. They may come from within the affected area or from outside the area (also known as: “convergent,” “emergent,” “walk-in,” or “spontaneous”).

Visual 7: Functions of Emergency Management



Instructor
Note

Review this illustration.

Explain there are important activities related to managing unsolicited goods and unaffiliated volunteers during all the functions of emergency management.



While emergency management was previously conceived as a circle with four phases, most of its functions are always going on. We'll explore some activities that could be occurring within each of the functions shown above and then go into further detail on the next few visuals.



Instructor
Note

As you review the next four visuals, allow participants to read the definition first. Then ask what kinds of actions they might take in each of the emergency management functions. Suggested responses are included under each visual in case you need to strengthen any points made by members of the class.

Visual 8: Prevention

Actions taken to avoid an incident or intervening to stop an incident from occurring



Instructor
Note

Ask: What kinds of actions might you take to prevent the second disaster of too many of the wrong donations and unaffiliated volunteers affecting response operations?

Suggested responses:

- Getting the information to the public about the correct way to donate and volunteer BEFORE the event, as well as immediately after the event.

Visual 9: Preparedness

Planning how to respond to a disaster



Ask: What kinds of actions might you take during preparedness?

Suggested responses:

- Develop, train, and exercise your local unsolicited goods and unaffiliated volunteers plan/annex before the event.
 - Form a team
 - Involve all stakeholders
 - Write plan/annex
 - Have it approved and signed by the legal authority of the local jurisdiction
 - Organize and equip for success
 - Train on responsibilities
 - Exercise the plan
 - Evaluate and improve the plan on a regular basis
- Pre-script press releases. If a Website is available, information can be posted and continually updated.
- Be proactive and attend civic organization meetings to educate them on the plan.
- Identify the State Voluntary Organizations Active in Disaster (VOAD) as well as any COADs (Community Organizations) and establish communications for coordination purposes.
- Organize a local Volunteer and Donations Coordination Team.
- Help individual voluntary organizations develop their own system for badging or identifying volunteers.



Instructor
Note

What kinds of actions might you take during preparedness?

Visual 10: Response

Emergency assistance to survivors during and immediately following a disaster



Ask: What kinds of actions might you take during response?

Suggested responses:



Instructor
Note

- Activate the plan
- Assemble the volunteer/donations coordination team
- Provide press releases
- Set up call center/Website
- Implement strategic facilities plan
- Collect and analyze donations intelligence/situational awareness
- Transition to recovery
- Demobilize

What kinds of actions might you take during response?

Visual 11: Recovery

Returning systems to normal or near normal operating conditions



Ask: What kinds of actions might you take during recovery?

Suggested responses:



Instructor
Note

- Dispose of surplus/un-needed goods – Share with the community-based organizations
- Recycle
- Send thank yous to volunteers and donors; keep donor relationships alive through recovery and beyond
- Scale back and close call center operations



It is helpful when closing a call center to leave a message on one incoming line to inform people of the closing and to give them more information on where to donate or volunteer.

Visual 12: Long-Term Recovery

- Usually lasts from 18 months to 2 years or longer
- Evaluate scaling back or closing of donations facilities
- Volunteers and donations are still needed
- Cash is very important
 - Organizations should save money rather than give it away immediately after the disaster



Explain recovery does not stop when a disaster is over. Long-term recovery can be difficult since media coverage ends and many volunteers return to their daily lives.

Instructor
Note



- Support the unmet needs committee with donations and volunteers (Long-Term Recovery Group, LRTG): Group of voluntary organizations that work together to coordinate and provide further long-term unmet needs.
- Take time to analyze the efforts for best practices to share as well as lessons learned.
- Local/county plans should address long-term recovery strategies.

Visual 13: Mitigation

Activities that eliminate or reduce the chance of occurrence or the effects of a disaster



Instructor
Note

Ask: What kinds of actions might you take during mitigation?

Suggested responses:

- Continue ongoing targeted messaging with pictures of the right and wrong way to donate and volunteer
- Evaluate the activation of the plan and use lessons learned to improve planning; your own organization and plans of your partners

Mitigation takes place on a continuous basis.



- The annex or emergency plan can be updated or revised on a regular basis.
- Voluntary organizations can work with the State and local jurisdictions in rebuilding efforts.

What kinds of actions might you take during mitigation?

Visual 14: Panel and Plan Review

Overview of State Plans

- How does it support Local Plans?
- When is it activated?
- When it's not activated, what Local Plans go into effect?
 - Who does what?
 - When?
 - What are differences between declared and non-declared?



Instructor
Note

Invite the representatives you have selected for the panel discussion to come to the front of the room.

Tell participants that you will facilitate a discussion and a review of the State Volunteer and Donations Management Plan(s) and how they support the Local Plans.

Transition to a discussion about the actions each jurisdiction and its partners will take during an emergency or disaster that is not large enough to result in a State declaration.

Encourage questions during the panel discussion.

Visual 15: Summary

1. Identify the key historical events in Volunteer and Donations Management.
2. Relate the national strategies for managing unsolicited donations, unaffiliated volunteers, and undesignated cash to events at the local and State levels.

Visual 16: Summary

1. Explain the continuous nature of emergency management functions.
2. Describe specific ways the State Volunteer and Donations Management Plan supports Local Plans and operations.



Summarize the unit for the participants with a few key points.

Instructor
Note

Let's see what you remember about what we covered in this unit ...



- In this unit, we have had a chance to gain appreciation of the unique characteristics of the management of unaffiliated volunteers and donations.
- We've also discussed how your State Plan supports the Local Plans for various jurisdictions and relates to local operations.



Ask for questions from the participants.

Instructor
Note

Unit 2 Transition



Many of the issues and challenges mentioned in this unit will be explored in more depth in subsequent units. In Unit 2, we will look at the nature of collaboration and what organizations are involved in a collaborative effort so necessary with volunteer and donations management in a disaster.

ACRONYMS FOR VOLUNTEER AND DONATIONS MANAGEMENT CLASS

*If a participant asks about the term COAD, tell him or her the term is not used because it is a copyrighted acronym in use for another purpose. Community Organizations Active in Disaster are generally considered Regional VOADs or community groups.

ACRONYMS

TERMS

ACS	Adventist Community Services
CAP	Community Action Programs
CBO	Community-Based Organizations
CFR	Code of Federal Regulations
*DRC	Disaster Recovery Center
DSS	Department of Social Services
EM	Emergency Management
EMAC	Emergency Management Assistance Compact
EOC	Emergency Operations Center
EOP	Emergency Operations Plan
ESF	Emergency Support Function
FCO	Federal Coordinating Officer
FEMA	Federal Emergency Management Agency
GIS	Geographical Information System
ICS	Incident Command System
IMAT	Incident Management Assistance Team
JFO	Joint Field Office
JIC	Joint Information Center
LTRG	Long-Term Recovery Group

ACRONYMS

TERMS

MACC

Multi-Agency Coordination Center

Mob Center

Mobilization Center

MRE

Meals Ready to Eat

National VOAD

National Voluntary Organizations Active in Disaster

NDMN

National Donations Management Network (information management system used by States)

NEMA

National Emergency Management Association

NGO

Non-Government Organization

NIMS

National Incident Management System

NPSC

National Processing Service Center

NRCC

National Response Coordination Center

NDRF

National Disaster Recovery Framework

NRF

National Response Framework

NWS

National Weather Service

OFDA

Office of Foreign Disaster Assistance

PAO

Public Affairs Officer

PDA

Preliminary Damage Assessment

PIO

Public Information Officer

PNP

Private-Not-for-Profit

POD

Point of Distribution

ACRONYMS

TERMS

PVOs	Private Voluntary Organizations
RA	Regional Administrator
Red Cross	American Red Cross
RRCC	Regional Response Coordination Center
SBA	Small Business Administration
SCO	State Coordinating Officer
SEOC	State Emergency Operating Center
SERT	State Emergency Response Team
SITREP	Situation Report
SOP	Standard Operating Procedures
USDA	United States Department of Agriculture
USDOT	United States Department of Transportation
VAL	Voluntary Agency Liaison
VDCC	Volunteer and Donations Coordination Center
VDCT	Volunteer and Donations Coordination Team
VOAD	Voluntary Organizations Active in Disaster (National, State, Regional, Community)

Unit 2: Collaboration and Partnership

Unit 2: Collaboration and Partnership

Estimated Time: 1.5 hours

Introduction

During this unit, we will focus on the benefits and challenges of collaboration, as well as the responsibilities of the players involved in volunteer and donations management.

Objectives

At the conclusion of this unit, the participants will be able to: 1. Describe the benefits and challenges of collaboration. 2. List organizations that collaborate on volunteer and donations management. 3. Explain the composition and operations of a Volunteer and Donations Coordination Team (VDCT).

Scope

- Interagency Collaboration
- Organizations and Individuals
- Volunteer and Donations Coordination Team (VDCT)

References/Handouts

When Disaster Strikes...How to Donate or Volunteer Successfully. L217, August 2007.

Methodology

- Interactive discussion
- Small group activity

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Interagency Collaboration	30 minutes
Organizations and Individuals	20 minutes
Volunteer and Donations Coordination Team (VDCT)	35 minutes
Unit Summary	3 minutes
TOTAL UNIT	90 minutes

Visual 1: Collaboration and Partnership



Introduce the unit.

Instructor
Note

Visual 2: Objectives

1. Describe the benefits and challenges of collaboration.
2. List organizations that collaborate on volunteer and donations management.
3. Explain the composition and operations of a Volunteer and Donations Coordination Team (VDCT).



Instructor
Note

Review the unit objectives with the participants.

Explain that interagency collaboration is an integral part of making your plan and disaster operations successful.



Neither chiefs of response organizations nor emergency managers have the right to tell a voluntary organization what to do during any emergency management functions. That is why you need to develop effective relationships with representatives of voluntary agencies before an emergency in your area.

Visual 3: What Is Collaboration?

... the process by which agencies make a formal, sustained commitment to work together on a common mission




Instructor
Note

Explore the concept of collaboration with the participants. On a deeper level, collaboration is easy to discuss and difficult to achieve because it involves being vulnerable and giving up something (e.g., resources, opinion, control).





- Collaboration is built on the foundations of cooperation, communication, and coordination.
- In fact, the guiding principles of the National Voluntary Organizations Active in Disaster (National VOAD) are the 4 Cs.
 - a. Cooperation
 - b. Communication
 - c. Coordination
 - d. Collaboration
- They are listed in that order (easiest to most difficult) because it references how member organizations grow in their working relationship with each other, but also with government and private-sector organizations.


Visual 4: Breaking the Barriers

	<p>Breaking the Barriers</p> <ul style="list-style-type: none"> • Discuss the assigned potential barrier • Determine if it is applicable to organizations in your area <ul style="list-style-type: none"> ○ If so, develop solutions ○ If not, what are other barriers faced by organizations in your area? • Prepare easel chart
---	--

Purpose: To develop solutions to several common barriers limiting organizations from building successful collaborative relationships.

	<ul style="list-style-type: none"> • Assign one of the following potential barriers to each of the table groups: <ul style="list-style-type: none"> ○ Lack of common terminology ○ Diversity in level of experience with emergency management/high turnover ○ Various priorities among organizations ○ Differing cultures among organizations ○ Limited money and resources ○ Turf issues • Ask them to read the instructions in their SM.
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	<p>Directions:</p> <ol style="list-style-type: none"> 1. Working with other members in your table group, discuss the potential barrier assigned. <ul style="list-style-type: none"> ○ Determine whether it is applicable to organizations in your area. ○ If so, develop as many solutions as possible. ○ If it is not applicable, explore whether organizations in your area face additional potential barriers. 2. Prepare an easel chart with the key points from your discussion and be ready to give a brief report to the rest of the class.
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	<p>Debriefing:</p> <p>Walk around while the groups are working so you can listen to the discussions.</p>
---	--

As each group reports, make sure the solutions listed below are covered for each of the potential barriers.

After each report, *ask* if any of the other groups have key additions or questions.

- Lack of common terminology
 - Collaboration is more efficient when all stakeholders use the same terms.
 - Use plain English and not acronyms.
 - Concepts in the National Incident Management System (NIMS) point to the need for common terminology in all aspects of emergency management.
- Diversity in level of experience with emergency management
 - Everyone has something to offer. Take the time to figure out what each organization's capabilities are, even those not immediately obvious. – Be open to ideas from everyone. Pre-establish communication routes such as:
 - E-mail
 - Mailing lists
 - Meetings
 - Blogs
 - Inexperienced organizations may have resources or experiences that can aid in volunteer and donations management.
 - They will then have more experience for future disasters.
- Various priorities among organizations
 - Develop an overarching mission statement, and each organization works toward that common mission.
 - Focus on the big picture for survivors and the needs of the community.
 - This will keep organizations focused and working together.
- Differing cultures among organizations
 - This can be most notable among government, private-sector, faith-based, and other community organizations who can approach disasters in different ways.
 - Some organizations have rigid operating procedures while others may have very relaxed procedures.
 - Look for the most effective approach to accomplishing the mission statement involving both government and non-government agencies.
 - Work to overcome biases, show respect, and adopt a give-and-take attitude.
 - Divergent groups provide many different ideas for problem-solving.

- Limited resources
 - Pool resources to get the biggest bang for the buck.
 - Encourage creativity in use of resources; do not forget the private sector.
 - Collaboration will lead to responsible equitable distribution of limited resources. Identify the need, not the greed. All goods should not go to one organization.
- Turf issues
 - Ensure that each group has a defined role and that its members understand the contribution of that role to the overall mission.
- No one agency can work alone. You must know the community and stakeholders involved.

Visual 5: Benefits of Collaboration

- Expand resources availability
- Eliminate unnecessary duplication of services
- Provide effective service to community
- Provide services to diverse groups
- Enhance problem-solving ability
- Engage in specialized expertise



Provide, if possible, very brief examples from your own experience to illustrate the points.

Instructor
Note



We want people to see the effort in working together will pay off and that there are benefits in doing so.

Visual 6: Collaborative Partners



Instruct participants to close their SMs before you ask the questions.

Instructor
Note



Ask: What key organizations and individuals are involved (or should be involved) to make the Volunteer and Donations Management Program work successfully in your area?

Discussion
Question



Capture their responses on an easel chart.

Easel Chart

Collaborative Partners

- Local, Tribal, or State/Regional VOADs
- Local, Tribal, and State Emergency Management Agencies (EMAs)
- State volunteer and donations coordinator
- Other local, tribal, and State agencies
- Warehouse manager
- Call center, phone bank, or Website manager



Explain there are several organizations or individuals involved in managing unsolicited donations and unaffiliated volunteers. All partners have roles to play in the annex or emergency plan and can bring additional resources.

Instructor Note Partners will change depending on the specifics of the local, tribal, or State plan.



Several key individuals become involved in managing unsolicited donations and unaffiliated volunteers. They may be part of the Volunteer and Donations Coordination Team (VDCT), which we will discuss next.

- Local, Tribal, or State Voluntary Organizations Active in Disaster (VOAD): Collaborates within the VDCT because VOAD members are the receiving agencies for volunteers and donations in disaster.
- Local, Tribal, or State Emergency Management Agency (EMA): Typically, the Public Information Officer (PIO) is the EMA representative. The PIO will receive information from VDCT and develop it for public delivery or assist a representative from the VDCT with message development and delivery.
- State Volunteer and Donations Coordinator: From EMA or other State agency. The key player for establishing/instituting the Volunteer and Donations Management Program.
- Other local, tribal, or State agencies.
- Warehouse Manager: The individual responsible for managing daily activities at the warehouse, who is tasked by the organization responsible for the warehouse.
- Call Center Manager: The individual designated to manage the phone bank, call center, or Website; implementing and updating scripts; identifying and training call-takers, etc.



Instructor
Note

Point out that the FEMA Voluntary Agency Liaison (VAL) or Donations Specialist plays a critical support role to the State, but those at the local level will rarely interface with the FEMA VAL.



Each State is required to have a Volunteer and Donations Coordinator who:

- Collaborates with a local VOAD point of contact, but might not be the lead VOAD point of contact.
- Coordinates the management of unsolicited goods and unaffiliated volunteers.



Discussion
Question

Ask: Do you know who your State Volunteer and Donations Coordinator is?



***Hopefully this person is already teaching (or at least attending) this course.
If so, hand out your contact information!***

Instructor
Note

Visual 7: Other Partners

- Business, industry, and professional leaders
- Media
- Labor organizations
- Civic organizations
- Faith-based organizations/associations
- Community-based organizations
- Others?



Explain there may be other partners in the local community you will need to collaborate with to achieve success.

Instructor
Note



- Business and industry leaders may be able to fill a certain need, such as:
 - Medicines
 - Discounts on goods
- The media may communicate your organization's needs and phone bank numbers, and should be involved in planning before the incident to educate them on your organization.
- Labor organizations can provide:
 - Transportation
 - Specialized volunteers
- Labor can be found through civic associations such as:
 - Rotary clubs and other civic groups, e.g., Lions, Moose, Elk
 - Kiwanis
 - Animal-related organizations, e.g., Humane Society
- Churches, synagogues, mosques, and interfaith groups may provide:
 - Volunteers
 - Counseling
 - Showers
 - Short-term emergency housing
- Community-based organizations may be smaller groups not associated with national or State VOADs, but they have resources and need to be a part of your plan.



Ask: Who are some additional collaborative partners in your area? Who else do you want at the table for planning (and at the disaster and during recovery following a disaster)?

Discussion **Explain** the Volunteer and Donations Coordination Team will oversee the
Question successful management of volunteers and donations during a disaster.

Visual 8: What is a Volunteer and Donations Coordination Team (VDCT)?

An organized team of government, private voluntary organizations, and the private sector that has a vested interest in all aspects of managing unaffiliated volunteers and unsolicited donations



- A VDCT is the group of collaborative partners involved in volunteer and donations management during a disaster. It brings resources to the table and represents volunteer groups in the response and recovery functions.
- You may need or want separate teams for volunteer management and donations management.
 - Use whatever works well for your area.



Point out that the sample organization chart for a VDCT for a disaster in which your local VDCT would be involved with the State is in Appendix A.

Instructor
Note

Visual 9: Key

- Local Volunteer and Donations Coordinator
 - Cash
 - Volunteers
 - Donations
 - Public information
- State Volunteer and Donations Coordinator (depending on the size of the disaster)



Lead the participants in a class discussion on the list of items.

Discuss the following with the participants:

Instructor
Note



- Functions of the VDCT include:
 - Donations intelligence (where donations are being dropped off, what is coming in, etc.)
 - Reporting requirements
 - Participation in daily communications
 - Liaison with other government agencies
 - Managing the phone bank
 - Coordination of media (social media, press releases, Public Service Announcements [PSAs], Website updates)
 - Coordination of offers; look at the offers and decide if they are to be accepted, declined, or referred to an organization.

Visual 10: Local Volunteer and Donations Coordinator Responsibilities

- Activate the annex
- Manage the VDCT
- Determine support needed from other agencies/organizations
- Coordinate with local government and emergency officials
- Manage the call center
- Coordinate field logistics



Ask participants how they collect donations intelligence or *share* your own experiences.

Discussion
Question

Visual 11: Local Volunteer and Donations Coordinator

- Coordinate media releases to set realistic public expectations
- Coordinate the flow of unsolicited goods, spontaneous volunteers, and undesignated cash
- Maintain a link with local or tribal EOC
- Delegate responsibilities as necessary
- Ensure a smooth transition from response to recovery



Lead the participants in a class discussion on the list of items. **Encourage** the participants to share their field experience as a State Volunteer and Donations Coordinator.

Instructor
Note

The following is a list of responsibilities of the State Volunteer and Donations Coordinator. Depending on the size and complexity of the disaster, not all of these responsibilities will be needed.



- The Volunteer and Donations Annex is part of the county or city's Emergency Operations Plan (EOP). The responsibilities of the Local Volunteer and Donations Coordinator are overseeing, writing, exercising, updating, and activating the Annex.
- Provide leadership of VDCT and manage potential issues of interpersonal dynamics (e.g., morale, mental health, conflict, scheduling).
- In conjunction with PIO, as appropriate, generate press releases, PSAs, Website updates, Twitter feeds, blogs, etc.
- Know where media releases should be sent. – Work with the local and State Public Information Office to ensure coordinated and accurate messages and information as the situation evolves.
- Delegate someone with the authority to coordinate the management and flow of unsolicited goods and spontaneous volunteers.
 - Make sure to communicate if this person changes.
 - Management of goods, volunteers, and cash requires different sets of skills.
 - The VDCT coordinates this management during disaster operations.
- Maintain an accurate and timely communication link with the local or tribal EOC and, if necessary, with the State EOC.

- Establish mile-markers in the planning stages as indicators of the transition from response to recovery.

Visual 12: Volunteer and Donations Coordination Center (VDCC)

The physical location for the VDCT:

- Does not receive goods or volunteers
- Maintains consistent communication with volunteer and donations support functions



Explain the elements of a Volunteer and Donations Coordination Center.

Instructor
Note



- The VDCC serves as the central location for the VDCT, and possibly the phone bank.
- The VDCC must have direct communication/contact with the EOC if not located in the same facility.
- The VDCC does not receive goods or volunteers.
- It is the central meeting place for the command team.

The number of phone lines required will depend on the size of your community.

If possible, reserve at least one or two unpublished lines for outgoing calls, as published numbers may quickly be overwhelmed.

Visual 13: What's In Your Annex?

Does your annex:

- List the primary and supporting agencies and organizations?
- Describe the members of the VDCT?
- List the responsibilities of the VDCT?



Ask participants to take out their copy of the local annex and review it for the questions on the visual.

Lead a discussion and answer any questions participants may have.

Instructor
Note

Visual 14: Summary

1. Describe the benefits and challenges of collaboration.
2. List organizations that collaborate on volunteer and donations management.
3. Explain the composition and operations of a Volunteer and Donations Coordination Team (VDCT).

Let's see what you remember about what we covered in this unit . . .



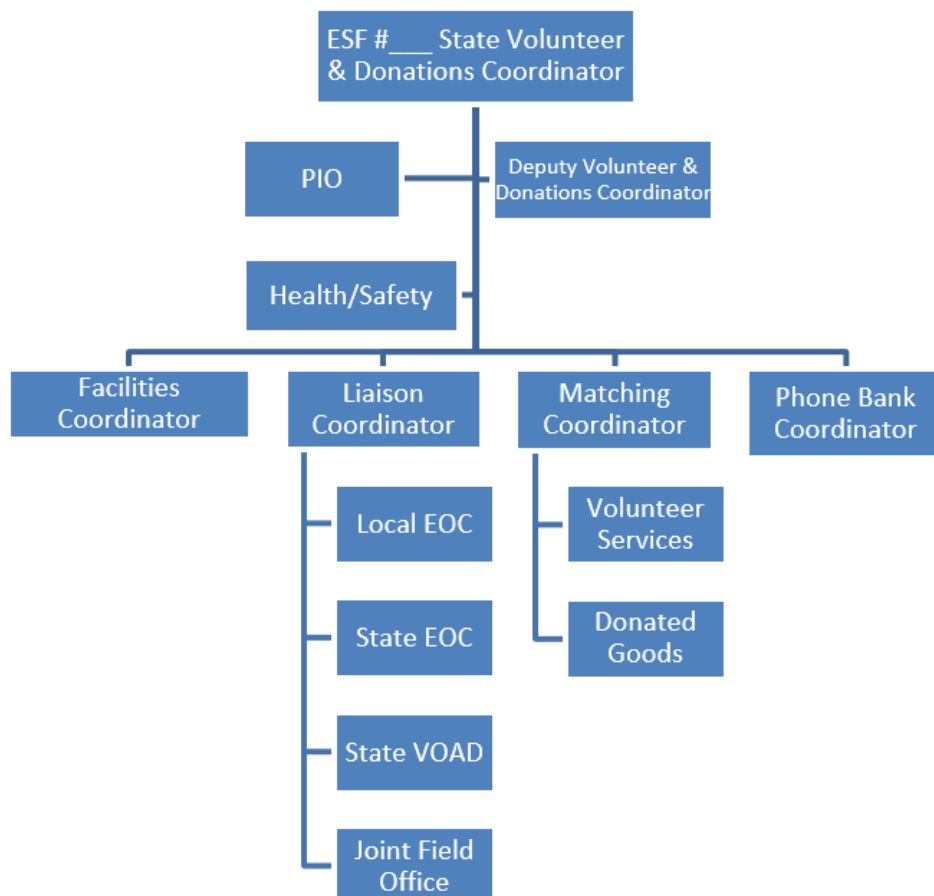
- **Summarize** the unit for the participants with a few key points.
- **State:** In this unit, we have had a chance to define the nature and types of collaborative partnerships of the unaffiliated volunteer and donations management in a disaster.
- **Ask** for questions from the participants.
- If none, then **state:** Many of the roles and responsibilities mentioned in this unit will be explored in more depth in subsequent units. In Unit 3, we will look at the ways to educate the public and deliver an effective media message so necessary with volunteer and donations management in a disaster.

Sample

Volunteer and Donations Coordination Team

Emergency Support Function # _____

Volunteer and Donations Management Program



Unit 3: Managing Public Education and Information

Unit 3: Managing Public Education and Information

Estimated Time: 1.5 hours

Introduction

During this unit, we will cover the reasons why people donate and how knowing their motivations can help you develop the most effective message regarding donations and volunteers.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Identify why people donate (individuals, groups, and private-sector companies).
2. List ways to educate the public about volunteering and donating before a disaster strikes.
3. Determine how to educate your public about the proper ways to donate and volunteer.
4. Define your target audience for your media messaging. 5. Use a message map to plan and deliver a message.

Scope

- Donors and Volunteers
- Reaching the Public
- The Message and Its Delivery: An Activity

References

- Risk Communication in Action: The Tools of Message Mapping
- Basic Public Information Officer Training, FEMA, G0290

Methodology

- Interactive discussion
- Small group activity

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Donors and Volunteers	25 minutes
Reaching the Public	20 minutes
The Message and Its Delivery: An Activity	40 minutes

Time Plan	
Unit Summary	3 minutes
TOTAL UNIT	90 minutes

Visual 1: Managing Public Education and Information



Instructor Note

- Donations of money, manpower, and material are a vital aspect of emergency management and require planning, coordination, and understanding by government officials, emergency management personnel, voluntary organizations, the media, and the public.
- To implement a successful donation and volunteer management program requires effective planning and education.
- Failure to address the issues of unsolicited and undesigned in-kind donations and spontaneous and unaffiliated volunteers can result in a “second disaster.”

To be effective with this management plan requires:



- Understanding why people donate and their expectations for use of donations.
- Providing detailed guidelines for donors, including timing of donations.
- Developing effective ways to reach the public with critical, accurate, and timely information.
- Conveying information about problems with unsolicited, undesigned donations and self-deployment of spontaneous, unaffiliated volunteers.
- Planning an effective coordination of information.

Visual 2: Objectives

1. Identify why people donate (individuals, groups, and private-sector companies).
2. List ways to educate the public about volunteering and donating before a disaster strikes.
3. Determine how to educate your public about the proper ways to donate and volunteer.
4. Define your target audience for your media messaging.
5. Use a message map to plan and deliver a message.



Review the objectives with the participants.

Instructor
Note

Visual 3: Discussion: Reasons for Donations



What are some reasons why individuals, groups, private sector, and foreign countries donate?

Discussion
Question



Allow participants time to discuss, capturing their responses on an easel chart.

Then **compare** their responses with the points on the next visual.

Easel Chart

Visual 4: Why People Donate or Volunteer



Motivated by:

- Sincere wish to help
- Religion or faith
- Have been survivors in the past
- Want to be part of a cause
- Respond to media reports
- Want a tax break
- Introduce new product into market
- Clean out closets



Review list with the participants and **discuss** why it's important—i.e., if you know their motivation, you can reach their needs and target the message.

Instructor
Note



- The more people see and hear about the disaster, the more they want to help the survivors. This is why it is so important to have media relations planned before, during, and after the disaster.
- If people have helped in the past, they want to help again.
- Seeing disorganized relief efforts or apparent unmet needs will often stimulate people to collect “stuff.”

Visual 5: Helpful Hints for Donors and Volunteers

- Remember that cash donations are best
- Confirm the need
- Pack well, label clearly, and plan transportation
- Donate miscellaneous goods to local charities
- Volunteers should be trained and affiliated with a volunteer agency



Instructor
Note

Review the list with the participants.

State: Recommend that people give cash, which will be discussed in more detail later in the course.



- Cash donations to voluntary organizations are best. Remember that this point should be stressed in your public education program. All other points about donating and volunteering are secondary.
- Confirm the need and pass the message of specific needs to potential donors.
- Educate the public about what is needed.
- It's okay to decline a donation offer—but be careful of how you decline it. If you are not accepting used clothing and someone shows up with used clothing, have a list of charitable organizations that will accept the clothing.
- Get the message out about how people should pack things—how items and boxes should be labeled. This is part of public education/messaging. Example: pack the items in a brown cardboard box, seal it, and label it, “canned fruit.”
- Recommend that volunteers need to be deployed through an organization with trained personnel.



Instructor
Note

Point out that these provide good content for use in preparing messages.

Ask participants to turn to Appendices A and B, which contain guidelines on sending in-kind donations and providing volunteer services.

Visual 6: Ways to Reach the Public



Ask participants to close their Student Manuals.

Instructor
Note

Ways to Reach the Public



Organization
newsletters



Speakers' bureaus



Briefings



Media



Websites: (Voluntary
Agencies, State EMA,
National VOAD, FEMA)



Social Media



Allow participants time to discuss, capturing their responses on an easel chart.

Easel Chart Then ask them to open their SMs and **compare** their responses with the points listed.



Listed below are just some of the ways to reach the public with a message about volunteering or donating. You must use those that work well for your area.

Instructor
Note

- *Organization newsletters*
- *Speakers' Bureaus*

- *Homeowners' Associations newsletters*
- *Briefings to local/tribal groups*
- *TV and radio*
- *Websites*
- *Local schools and universities*
- *ListServes*
- *Text messaging*
- *Public gatherings*
- *Social media (Twitter, FaceBook, etc.)*
- *Flyers*
- *Public events*

Point out that their Local or Tribal Volunteer and Donations Management Plan should contain information about who is responsible for public outreach.

Visual 7: Coming to Terms With New Media

- Blog
- Citizen journalism
- Micro-blogging
- Photo sharing
- Podcast
- Really Simple Syndication (RSS)
- Smartphone
- Social media
- Video blogging
- Web 2.0
- Webcast



Instructor
Note

Refer participants to the New Media Glossary in Appendix C.

Lead a brief discussion by asking participants if they have experience with, or questions about, any of the new media listed on the visual.

If no one has an experience or question to share, use the glossary and your own experience to review the terms on the visual.

Use your own anecdotal information or some of the following points to engage the participants in discussion:



- To look at just one example of new media, Twitter is being called not just a useful part of disaster response and recovery, but an essential one. In-person Tweeting (sending Twitter messages) has become a regular part of natural disasters and Twitter makes it as easy as texting not just to one person, but everyone who subscribes to Twitter, including a rapidly growing number of journalists.
- Certainly, part of Twitter's power is that messages can be sent and received, not just from computers, but also from cell phones and Smartphones, making the technology truly portable.
- As an example of Twitter's acceptance, during the immediate reaction to the March 2011 Japanese earthquake and tsunami, FEMA posted links to Tsunami Advisories for specific Regions, preparedness tips, and live streaming from inside State emergency centers on the West Coast. (<http://www.govexec.com>, March 11, 2011).
- With new media, the public is no longer only the audience. Every member of the public is a potential reporter!
- We've seen individuals with mobile devices using blogs, video, and Twitter to spread information in real time during an emergency. New media can both aid and detract from emergency response and is proving to be a tool, but also a challenge.

Visual 8: Basics Concepts Do Not Change

The questions remain the same:

- Why are you communicating?
- Who are you trying to reach?
- What will you say? How will you say it?



Staying on top of what is "New" Media is the key!

Note



Refer to the visual and *make* the following points:

Instructor
Note



- Basic concepts in information management do not change with the inclusion of new media tools. Whether you are using a press release or a blog to get the message to your audience about donations and volunteering, you still need to answer the basic questions:
 - Why are you communicating? (Your objective)
 - Who are you trying to reach? (Your audience)
 - What will you say and how will you say it? (Your medium)

Visual 9: Target Audiences/Stakeholders for Messaging

- Elected officials
- The media
- Emergency management
- Professional groups (to prevent self-deployment)
- Youth groups
- Others?



Prompt participants to explore the last bullet (e.g., cultural messaging, demographics, socio-economic factors).

Instructor
Note



- Now, let's examine your audience. Who do you need to reach?
- With the media, be sure your message to all organizations is consistent (same message distributed to all groups).

Visual 10: Public Messaging

- Aims to limit the flow of spontaneous volunteers and unsolicited donations to a manageable level
- Stakeholders working together should have one consistent message
 - The message and messenger should be established before the disaster



Instructor
Note

Be proactive prior to an event with ongoing information:

- Have pre-scripted press releases ready to be sent out.
- Provide “talking points” for government officials to use with media.
 - For structuring the key messages, you may want to use a message map.
 - A message map is an organized means for displaying layers of information. It contains detailed, hierarchically organized responses to anticipated questions or concerns.

Refer participants to the Sample Message Maps in Appendix D.

Ask them how these samples, one for an influenza epidemic and the second for a declared disaster, would be changed for their use.

Lead a brief discussion about the benefits of using a message map to educate the public about ways they can donate or volunteer. Their answers should include some, or all, of the following benefits:



- Identify stakeholders early on in the communication process.
- Anticipate the questions and concerns of the stakeholders before they appear.
- Organize our thoughts and ideas and prepare messages in response to the concerns and questions of the stakeholders.
- Develop key messages and supporting information in the context of a clear, concise, transparent, and accessible framework.
- Promote an open dialogue about the messages both inside and outside the organization.
- Provide the spokesperson with a user-friendly guide.
- Make sure that the organization has consistent information and messages.
- Make sure that the organization speaks with a single voice.

Remind participants that having message maps prepared in advance is very efficient because messages can be sent out quickly.



Hand out any local or tribal Sample Press Releases, Public Service Announcements, newsletters, or flyers you have been able to locate.

If available, ***hand out*** copies of the “When Disaster Strikes” brochure, FEMA L-217 here. They are available for downloading at http://www.fema.gov/pdf/donations/when_disaster_strikes.pdf

The Message and Its Delivery: An Activity



Activity

The Message and Its Delivery

Purpose: To practice developing and delivering a message based on a scenario.



Instructor Note

Refer participants to the scenario in their SMs.

Divide the class into the appropriate number of groups according to class size, placing no more than six participants in each group. If different towns, cities, counties, or tribes are represented, have **people from the same location** work together.

- If people from different areas are working together, instruct them to pick one of the towns or cities represented by a member in the group to place the scenario.
- Instruct participants to read the scenario and to answer the questions.

Remind participants their role is to manage the Local/Tribal Volunteer and Donations program, not to determine the operations for the incident.



Easel Chart

Directions:

1. Read the scenario.
2. Working with other members of your group, answer the questions.
3. Record your answers on the easel and be prepared to report to the class.



Instructor Note

Debriefing:

Make sure that groups include the following in their responses:

1. Establish and activate a toll-free number and a Website to respond to offers of cash, volunteer services, and donated goods.
2. Discuss the situation with the town officials to coordinate before release of details.
3. Coordinate Public Service Announcements with a Public Information Officer (PIO) and members of the VDCT, if one has been established.
4. Pre-script press release.



Discussion Question

After all the reports, **lead** a discussion using the following questions.

- Is there a general message that can be established now for your community and adjusted post-disaster?
- Who should be involved in developing that message for volunteers? For donations?

SCENARIO

At 6:04 a.m., local and mutual aid fire and ambulance vehicles rushed to the scene of a huge fire engulfing the largest apartment building in your town. It took 125 firefighters more than 3 hours to bring the fire under control. Twenty-two apartments are consumed by the fire, meaning that 58 people are displaced. While the structure is not a total loss, it will take at least a year to rebuild.

Fortunately, the building manager roused all the residents so everyone evacuated. No one was seriously hurt during the evacuations.

Only one of the families has renter's insurance; the rest are totally uninsured for their loss. Many have only the clothes in which they were sleeping, although a few of the families were able to rescue household pets and a few of their belongings.

By 9:15 a.m., the county American Red Cross has set up operations in a local church. They are providing 3 days of shelter for the displaced families in a local hotel but have warned local officials that they cannot provide money for housing beyond that date.

Since the first sirens sounded, dozens of people have walked to the scene to see what is happening. They are 3 blocks away because of the police barricade tape. Some are just gawking, but several are talking to each other about what they can do to help out.

The mayor has posted a notice about the fire requesting that all donations be dropped off at a local restaurant. Fortunately, he has gotten permission from the business owner before his announcement. However, he did not specify what was needed or when people were to drop off donations.

Simultaneously, and with all good intentions, one of the town commissioners announced on the same Website: "Please give all you can. We need donations for the fire victims from the apartment building tragedy this morning. Most of them have no family in the area to depend on and they have nothing left. Drop your donations at the fire station any time, day or night, and we will make sure the victims get what they need."

Questions/issues for this Unit to be addressed by the groups:

- Develop a news release OR message map for the "response" to this scenario, given the conflicting messages sent by town officials. It should include your immediate "message" for donating goods vs. cash and your immediate need for volunteers.
 - Who will you coordinate this release with before you send it out?
 - Where and how will you disseminate the information?
- Are there any groups that will require a message specifically targeted: foreign-language communities, residents with access and functional needs, etc.?

- You have received calls from two neighboring communities asking if there is any message they should share with their residents about donating goods and volunteering for your emergency response that would be helpful to the overall effort.

Message Map Template for Activity

Stakeholder:

Question or Concern:

Key Message 1	Key Message 2	Key Message 3
Supporting Information 1-1	Supporting Information 2-1	Supporting Information 3-1
Supporting Information 1-2	Supporting Information 2-2	Supporting Information 3-2
Supporting Information 1-3	Supporting Information 2-3	Supporting Information 3-3

Visual 11: What's In Your Annex?

Does your annex:

- State which person or organization/agency is responsible for volunteer and donations management messaging?
- Have pre-scripted message maps or releases?
- Assign an organization or individual to development and implementation of social media?



Ask participants to take out their copy of the local annex and review it for the questions on the visual.

Lead a discussion and answer any questions participants may have.

Instructor
Note

Visual 12: Summary

1. Identify why people donate (individuals, groups, and private-sector companies).
2. List ways to educate the public about volunteering and donating before a disaster strikes.
3. Determine how to educate your public about the proper ways to donate and volunteer.
4. Define your target audience for your media messaging.
5. Use a message map to plan and deliver a message.



Ask for questions from participants.

Summarize the unit for the participants with a few key points.

Instructor
Note



In this unit, we have had a chance to define effective public messaging and how to educate the public on volunteers and donations in a disaster.

If there are no questions, then ***state:*** “In Unit 4, we will discuss the strategies to manage unsolicited in-kind donations so necessary in a disaster.”

GUIDELINES FOR SENDING IN-KIND DONATIONS TO DISASTER SURVIVORS

Use these guidelines to plan your collection of in-kind donations for disaster survivors.

- **Remember, cash contributions are often the best donation.**

Cash contributions allow professional relief organizations to purchase what is most urgently needed by disaster survivors, and to pay for the transportation necessary to distribute those supplies. Unlike in-kind donations, cash donations have no transport costs. Also, cash donations given to recognized relief organizations are often tax deductible. In addition, cash donations allow relief supplies to be purchased at locations as near to the disaster site as possible. Supplies, and particularly food, when purchased locally have the advantage of stimulating local economies and ensuring the supplies will arrive as quickly as possible.

- **Confirm that there is a need.**

Exactly what is needed can be confirmed by checking with a relief organization that has personnel working at the disaster site, or by calling the State toll-free number set up specifically for donations during a given emergency. Different disasters create different needs. Local climate and culture of the affected area must be considered.

- **Donate through an organization.**

Before starting a collection of goods to send to a disaster site, it is essential to locate a reliable relief organization willing to receive the shipment of donated goods. When unsolicited truckloads of items arrive at a disaster site, there is often no place to unload the goods. Too often, items are left in an empty lot to be plundered or rained on and eventually become part of the garbage that must be removed during the cleanup phase of the disaster response.

- **Plan transportation in advance.**

Never assume that unsolicited relief supplies will be transported at no charge. Local trucking firms may be willing to help in times of disaster, if funds are available to cover part of the expense. Some volunteer agencies may have trucks going to the disaster site that can take donations, or they may be able to identify another group in the area.

Be sure to have the following list of information when arranging transportation:

- Point of contact at disaster area.
- Verification of storage facilities, including special storage needs such as refrigeration, and personnel for offloading at the disaster location. (Boxes should be strong and sized for a single person to carry. If goods are on pallets, make sure that the receiving warehouse has unloading equipment.)
- Inventory of goods to be transported.
- Approximate weight of total load to be transported.

- **Ensure that donated items are packed well and clearly labeled.**

It is more efficient when items sent are already sorted, labeled, and ready for distribution. Specific content lists should be taped to the side of each box sent. This allows officials to determine quickly what the box contains without opening it. To save relief workers' time, food donations in smaller packages (cans) are preferred over bulk packaging, unless donating to an agency involved with mass feeding. New clothing should be packed in separate boxes according to gender, size, and season.

GUIDELINES FOR VOLUNTEER SERVICE

Review this list of guidelines for volunteer service before volunteering after a disaster. Following these guidelines will help you—and help the disaster survivors.

- **Affiliate before showing up.**

Instead of arriving unexpectedly in a disaster-affected area, volunteers should register with a recognized volunteer agency. There are many agencies. Most are organized under the National Voluntary Organizations Active in Disaster (National VOAD); however, if a volunteer is unable to identify one, then he or she should register with the local Volunteer Center recording offers of availability from unaffiliated volunteers.

- **Prepare for self-sufficiency.**

Commonly, there are inadequate facilities for feeding, housing, personal hygiene, and health/medical needs for unaffiliated volunteers. Therefore, it is best to attach with a recognized agency as the first step in involvement.

- **Be patient and flexible.**

Volunteers should be prepared to step into any of a variety of roles, depending on current or sudden needs. Volunteers expecting to enter a response or relief effort in a certain capacity will often be disappointed. Sometimes a volunteer's unique talents are not immediately needed.

- **Know the liability situation.**

A volunteer should be certain that there is coverage by liability clauses in the insurance structure of the volunteer agency with which he or she is affiliated. Usually, this will be the case. A volunteer working in the response effort, but not registered with a volunteer agency, should assume that all liability is entirely with the volunteer as an individual.

- **Remember that the use of volunteers is a coordinated process.**

The use of volunteers is an organized process by which people with abilities, skills, and/or training are assigned to special tasks. Volunteers are most useful when they are able to do the right thing at the right time. That is, they are used as part of a plan.

- **Be committed to the response effort.**

Response and recovery work is most often dirty, monotonous, mundane, and not

glamorous. There is little individual recognition. Volunteers should be committed to work under such conditions and fit within plans that are coordinated by the volunteer agencies.

New Media Glossary

While not all-inclusive, this glossary offers definitions and examples of many components of today's "New Media." The following content was compiled in March of 2011. Due to the rapidly changing landscape of communication technology and trends, it is important to frequently review, update, and add new information to maintain the value of this glossary.

Blog

A blog (a contraction of the term Weblog) is a Website, usually maintained by an individual with regular entries of commentary, descriptions of events, or other material such as graphics or video. Entries are commonly displayed in reverse-chronological order. "Blog" can also be used as a verb, meaning to maintain or add content to a blog.

Many blogs provide commentary or news on a particular subject; others function more as personal online diaries. A typical blog combines text, images, and links to other blogs, Web pages, and other media related to its topic. The ability for readers to leave comments in an interactive format is an important part of many blogs.

Citizen journalism

Citizen journalism is the act of nonprofessionals "playing an active role in the process of collecting, reporting, analyzing and disseminating news and information," according to the seminal report *We Media: How Audiences are Shaping the Future of News and Information*, by Shayne Bowman and Chris Willis. They say, "The intent of this participation is to provide independent, reliable, accurate, wide-ranging, and relevant information that a democracy requires."

According to Mark Glasser, a longtime freelance journalist who frequently writes on new media issues, "The idea behind citizen journalism is that people without professional journalism training can use the tools of modern technology and the global distribution of the Internet to create, augment, or fact-check media on their own or in collaboration with others."

Facebook (see Social network service)

Mashup (Web application hybrid)

In Web development, a mashup is a Web application that combines data from one or more sources into a single integrated tool. The term Mashup implies easy, fast integration, frequently done by access to open data sources to produce results that were not the original goal of the data owners. An example of a mashup is the use of cartographic data from Google Maps to add location information to real estate data, thereby creating a new and distinct Web service that was not originally provided by either source.

Micro-blogging

Micro-blogging is a form of multimedia blogging that allows users to send brief text updates (say 140 characters or fewer) or micromedia (such as photos or audio clips) and publish them, either to be viewed by anyone or by a restricted group that can be chosen by the user. These messages

can be submitted by a variety of means, including text messaging, instant messaging, e-mail, digital audio, or the Web.

For example, Twitter is a free social networking and micro-blogging service that enables its users to send and read other users' updates known as tweets. Tweets are text-based posts of up to 140 characters that are displayed on the user's profile page and delivered to other users who have subscribed to them (known as followers). Senders can restrict delivery to those in their circle of friends or, by default, allow anybody to access them.

New Media

New media is a term meant to encompass the emergence of digital, computerized, or networked information and communication technologies in the later part of the 20th century. Most technologies described as "new media" are digital, often having characteristics of being manipulable, networkable, dense, compressible, and impartial.

Photo sharing

Photo sharing is the publishing or transfer of a user's digital photos online through both Websites and applications that facilitate the upload and display of images. The term can also be loosely applied to the use of online photo galleries that are set up and managed by individual users, including photoblogs.

Podcast

A podcast is a series of visual or sound files that are distributed over the computer by syndicated download, through Web feeds, to portable media players and personal computers. Though the same content may also be made available by direct download or streaming, a podcast is distinguished from most other digital media formats by its ability to be syndicated, subscribed to, and downloaded automatically when new content is added. Like the term broadcast, podcast can refer either to the series of content itself or to the method by which it is syndicated; the latter is also called podcasting. The host or author of a podcast is often called a podcaster.

Really Simple Syndication (RSS)

RSS (abbreviation for Really Simple Syndication) is a family of Web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio, and video—in a standardized format. An RSS document (which is called a "feed," "Web feed," or "channel") includes full or summarized text, plus metadata such as publishing dates and authorship. Web feeds benefit publishers by letting them syndicate content automatically. They benefit readers who want to subscribe to timely updates from favored Websites or to aggregate feeds from many sites into one place. The user subscribes to a feed by clicking an RSS icon in a browser that initiates the subscription process. The RSS reader checks the user's subscribed feeds regularly for new work, downloads any updates that it finds, and provides a user interface to monitor and read the feeds.

Short Message Service (SMS)

Short Message Service (SMS) is a communication service standardized in mobile communication systems, using standardized communications protocols allowing the interchange of short text messages between mobile communication devices. According to Wikipedia as of April 2011, SMS text messaging is the most widely used data application on the planet, with at least 2.4 billion active users, or 74 percent of all mobile phone subscribers sending and receiving text messages on their phones. The SMS technology has facilitated the development and growth

of text messaging. The connection between the phenomenon of text messaging and the underlying technology is so great that in parts of the world, the term “SMS” is used as a synonym for a text message or the act of sending a text message, even when a different protocol is being used.

Smartphone

A Smartphone is a mobile phone offering advanced capabilities beyond a typical mobile phone, often with PC-like functionality. There is no industry standard definition of a Smartphone. For some, a Smartphone is a phone that runs complete operating system software providing a standardized interface and platform for application developers. For others, a Smartphone is simply a phone with advanced features like e-mail and Internet capabilities, and/or a built-in full keyboard or external USB keyboard and VGA connector.

Social media

Social media are primarily Internet- and mobile-based tools for sharing and discussing information. The term most often refers to activities that integrate technology, telecommunications, and social interaction; and the construction of words, pictures, videos, and audio. This interaction, and the manner in which information is presented, depends on the varied perspectives and “building” of shared meaning among communities, as people share their stories and experiences. Businesses also refer to social media as user-generated content (UGC) or consumer-generated media (CGM).

Social network service

A social network service focuses on building online communities of people who share interests and/or activities, or who are interested in exploring the interests and activities of others. Most social network services are Web-based and provide a variety of ways for users to interact, such as e-mail and instant messaging services.

The main types of social networking services are those that contain directories of some categories (such as former classmates), means to connect with friends (usually with self-description pages), and recommender systems linked to trust.

For example, Facebook is a free-access social network service.

Twitter (see Micro-blogging)

User-generated content (UGC) (see Social media)

Video blogging

Video blogging, sometimes shortened to vlogging or vidblogging, is a form of blogging for which the medium is video. Entries are made regularly and often combine embedded video or a video link with supporting text, images, and other metadata. Video logs (vlogs) also often take advantage of Web syndication to allow for the distribution of video over the Internet using either the RSS or Atom syndication formats, for automatic aggregation and playback on mobile devices and personal computers. Video hosting service A video hosting service allows individuals to upload video clips to an Internet Website. The video host will then store the video on its server, and show the individual different types of code to allow others to view this video. The Website, mainly used as the video hosting Website, is usually called the video-sharing Website.

For example, YouTube is a video-sharing Website where users can upload, view, and share video clips.

Web 2.0

The term “Web 2.0” refers to a perceived second generation of Web development and design that aims to facilitate communication, secure information sharing, interoperability, and collaboration on the World Wide Web. Although the term suggests a new version of the World Wide Web, it does not refer to an update to any technical specifications, but rather to changes in the ways software developers and end-users utilize the Web.

Web 2.0 concepts have led to the development and evolution of Web-based communities, hosted services, and applications such as social networking sites, video-sharing sites, wikis, and blogs.

Webcast

A Webcast is a media file distributed over the Internet using streaming media technology. A Webcast may either be distributed live or on demand. Essentially, Webcasting is “broadcasting” over the Internet. A Webcast uses streaming media technology to take a single content source and distribute it to many simultaneous listeners/viewers. The largest “Webcasters” include existing radio and TV stations that “simulcast” their output, as well as a multitude of Internet-only “stations.”

Web mapping

Web mapping is the process of designing, implementing, generating, and delivering maps on the World Wide Web. Although the terms Web GIS and Web mapping are used synonymously, they don’t mean exactly the same thing. Web maps are often a presentation media in Web GIS, and Web maps are increasingly gaining analytical capabilities. A special case of Web maps are mobile maps, displayed on mobile computing devices, such as mobile phones, Smartphones, Personal Digital Assistants (PDAs), Global Positioning System (GPS) units, and other devices. If the maps on these devices are displayed by a mobile Web browser or Web user agent, they can be regarded as mobile Web maps. If the mobile Web maps also display context- and location-sensitive information, such as points of interest, the term location-based services is frequently used. Customizable Web maps are usually more complex Web mapping systems that offer Application Programming Interfaces (APIs) for reuse in other people’s Web pages and products. Examples of such a system are Yahoo! Maps and Google Maps.

Wiki

A wiki is a page or collection of Web pages designed to enable anyone who accesses it to contribute or modify content, using a simplified markup language. Wikis are often used to create collaborative Websites and to power community Websites. The collaborative encyclopedia Wikipedia is one of the best-known wikis.

A defining characteristic of wiki technology is the ease with which pages can be created and updated. Generally, there is no review before modifications are accepted. Many wikis are open to alteration by the general public without requiring them to register user accounts. Sometimes logging in for a session is recommended, to create a “wiki-signature” cookie for signing edits automatically. Many edits, however, can be made in real-time and appear almost instantly online. This can facilitate abuse of the system. Private wiki servers require user authentication to edit pages, and sometimes even to read them.

YouTube (see Video hosting service)

In response to the flood relief efforts, there have been questions as to what items and services are needed. Central City encourages people to give cash donations to an organized voluntary agency of your choice.

Central City officials are helping to coordinate between people and businesses who wish to donate money, goods, and services with agencies that are able to receive, store, and distribute donated items.

For more information on what and where to donate, call the Central City Coordination Center at phone number 1-800-555-1212.

Sample Message Maps

While the Message Map below addresses the public's concern about an influenza epidemic, the format can serve you well when developing messaging about volunteers or donations following a disaster.

Stakeholder: Public

Question or Concern: What does the public most need to know about the influenza epidemic?

Key Message 1	Key Message 2	Key Message 3
Vaccination a top priority for:	Symptoms	Highly contagious
Supporting Information 1-1	Supporting Information 2-1	Supporting Information 3-1
Elderly	Fever	Avoid direct contact with others
Supporting Information 1-2	Supporting Information 2-2	Supporting Information 3-2
Health care workers	Congestion (cough, sore throat)	Avoid sharing food, drinks
Supporting Information 1-3	Supporting Information 2-3	Supporting Information 3-3
Immuno-compromised individuals	Muscle aches and pains	Keep bedding (sheets, linens) clean

Information for LTRG Members

Instructions: A Presidential Disaster Declaration for Public Assistance, Individual Assistance and the Hazard Mitigation Grant Program has been made for all counties within a State. You

have been asked to attend a long term recovery group (LTRG) meeting for the first time to discuss what FEMA is doing.

Stakeholder: LTRG members

Question or Concern: What is FEMA doing and how does it relate to the LTRG?

Key Message 1	Key Message 2	Key Message 3
Encourage all disaster survivors to register	FEMA isn't the team, but only part of the team.	FEMA Voluntary Agency Liaisons (VALs) are here to support the LTRG and its partners
Supporting Information 1-1	Supporting Information 2-1	Supporting Information 3-1
All survivors are encouraged to register at disasterassistance.gov or 800-621-FEMA.	FEMA commends the work of the LTRG for your role in providing humanitarian relief.	VALs are here as a resource to support the State of _____ and its VOAD partners.
Supporting Information 1-2	Supporting Information 2-2	Supporting Information 3-2
Don't assume ineligibility due to insurance.	All disasters start local, and end local, and we know that the LTRG will be here after FEMA leaves.	VALs can explain the sequence of delivery for disaster assistance, as well as field question on FEMA programs.
Supporting Information 1-3	Supporting Information 2-3	Supporting Information 3-3
Registering for LTRG assistance is not the same as registering for FEMA.	The LTRG plays a key role in ensuring that disaster caused unmet needs of disaster survivors are met.	VALs can assist with information on how to receive FEMA registration information via the Privacy Act of 1974 Routine Uses

Unit 4: Managing Unsolicited Donated Goods

Unit 4: Managing Unsolicited Donated Goods

Estimated Time: 1 hour

Introduction

During this unit, we will discuss the need to emphasize that cash donations are best. Since goods will still be donated, we'll talk about operating a collection center and distribution centers. We will also discuss the benefits of continuing operations through recovery.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Describe why cash donations are more economically feasible than donated goods.
2. Define requirements for collection centers.
3. List types of distribution centers.
4. Summarize the benefits of operating through recovery.

Scope

- What Does It Cost?
- Flow of Donations
- Collection and Distribution Centers
- Manage Those Goods: An Activity

Methodology

- Interactive discussion
- Small group, scenario-based activity

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
What Does It Cost?	10 minutes
Flow of Donations	5 minutes
Collection and Distribution Centers	20 minutes
Manage Those Goods: An Activity	20 minutes
Unit Summary	3 minutes

Time Plan	
TOTAL UNIT	60 minutes

Visual 1: Managing Unsolicited Donated Goods



Introduce the unit.

Instructor
Note

Visual 2: Objectives

1. Describe why cash donations are more economically feasible than donated goods.
2. Define requirements for collection centers.
3. List types of distribution centers.
4. Summarize the benefits of operating through recovery.



Review objectives with the participants.

Instructor
Note

Visual 3: What Does It Cost?

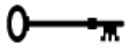


- Someone donates canned goods.
- The canned goods are gathered at a centralized point and boxed.
- The box of canned goods is loaded on a truck and shipped (which costs dollars).
- The truck is unloaded.
- The cans and individual items are resorted.
- The sorted items are repacked in specially marked donation boxes.
- The boxes are shipped to a distribution site.
- Disaster survivors pick up the donated goods.



Discuss the cost difference of moving a can of food versus cash.

Instructor
Note



Statistical information indicates that the cost of donating a can of food through the stages of management is at least \$10 vs. a can that is purchased at about \$.85.

Visual 4: What Does It Cost? 2



Emphasize these important points:

Instructor
Note



- Cash is best—it assists the local economy in its recovery.
- Buying products within the local economy helps the recovery of the community.
- Cash can be used to buy exactly what is needed, when it is needed, not what the donor believes is needed.
- It also ensures freshness of the product.
- Some donated goods may be out of date.

Visual 5: Reality is . . .

Even though you "just say no" . . .



. . . goods will still come and a facility to manage those goods may be required.



Visual 6: Managing the Flow of Donations



Instructor
Note

Review this chart with the participants.

Explain that a place will need to be set up to receive, store, and distribute unsolicited goods. These are called collection centers.

Emphasize that collection and distribution must be separated, even if in the same building.



Most of the time, the goods will go to a Collection Center. If the goods are packaged correctly and are needed, then they can be directed straight to a Local Distribution Center.

In a small emergency or jurisdiction, the collection and distribution may be done from the same building. However, it is VITAL to separate the warehouse collecting and sorting operations from the distribution operations.

You could even use the back of a building for drop off and the front for pick up if you only have one building.

Visual 7: Collection Centers

- Often public sites for collecting unsolicited goods
- Converts "Stuff" to "Goods"



Instructor
Note

Point out the definition of a collection center: a location to capture miscellaneous donated goods coming into a disaster area where donations can be sorted, inventoried, and shipped to distribution centers.



Easel Chart

Write the following acronyms on an easel chart:

Stuff = Surplus Trash Useless to Frantic Folk

Goods = Gleanings Out Of Donated Stuff (Sorting Operation)



An efficient management program will take “stuff” and make “goods” out of it.



Discussion
Question

Ask: Who would manage the collection center in your town?

Visual 8: Collection Centers (Continued)

- Develop a plan to operate and demobilize a collection center
- Identify, sort, inventory, and prepare items for distribution
- Consider structure for distribution
 - Voluntary agencies
 - Faith-based organizations
 - Survivors at distribution centers
- Record and document process

Potential collection centers should be identified before an event or disaster occurs. Businesses and residents who live nearby need to know what these centers are. They should be included in your plan along with information management considerations for recording and tracking:



- What goods are received
- Who made donations in order for them to receive recognition
- How goods will be distributed and transported to non-profits, survivors, distribution centers if established, etc.
- Your local plan should also include a criteria and process for demobilizing collection centers and/or a warehouse.



Explain some large local or State disasters may require the use of a multi-agency warehouse.

Instructor
Note

Visual 9: Information Management

- Inventory Tracking
- Systems may be interrupted
- Create redundancy with layers
 - Web-based technology
 - Non-networked computer
 - Paper forms that duplicate electronic entries



Expand the information management ideas presented on this visual.

Instructor
Note



Ask: “What is the most critical piece of information management at a warehouse or even a small collection center

Sample answer: *Inventory*

Discussion
Question

Share the following real-life scenarios with the participants:

- You may need to start your inventory with a pen and paper.
 - You may have 30 people dropping off bags of donations before you get a computer to track your inventory.
 - Power outages and Internet interruptions can also halt computer-based inventory control.
 - Always have a backup in case technology fails.
 - Paper copy may be predominantly used as the initial method of inputting information before you have the opportunity to input it into a computer.
- Consider having the inventory program on a stand-alone computer, so if the internet is down, you can still use a computer.
- Have forms printed out from the computer program so you can use paper-based if the computer is not available.
- Redundancy across all systems is key to success.



Visual 10: Communications

- External
 - VDCT
 - Distribution Centers
 - Incoming Trucks
 - Others?
- Internal
 - Between sections and key personnel (use walkie-talkies)



Instructor
Note

Expand the communications ideas presented in this visual.

Ask: “Who is part of the external teams like the VDCT?”



Discussion
Question

Ask: “What other considerations are there whether you are operating a collection or distribution center?”

Sample answer: *Personnel*



Effective communications is key to having successful operations. For example, external communications can help identify where all the goods are at all times—what is coming in and when it is coming in. This type of communication provides a base for planning the number of volunteers you will need to assist in operations. Internal communications is as important as external communications.

Visual 11: Discussion: Distribution Center Locations



What makes a good distribution center?

What are possible locations for distribution centers?

Discussion
Question



Effective collection, sorting, and inventory of donated goods is incomplete without a mechanism in place for the distribution of collected items.



Instructor
Note

Ensure that answers include the following points:

- Characteristics of a good distribution center include:
 - Easy for survivors to locate
 - Effective security
- Potential locations:
 - Food banks
 - Clothing pantries
 - Voluntary organization facilities
 - Vacant stores

Point out that local government, fire, and emergency services facilities may seem like perfect locations, but may not work out because of their day to day space requirements.

Encourage participants to check with their local businesses and corporations since they may become partners in donations management.

Visual 12: Discussion: Maintaining a Collection Center



Are there advantages to maintaining a collection center through recovery?

Discussion
Question



Lead participants in exploring answers to this question. Answer—YES.

Discussion
Question



Capture the advantages on an easel chart.

Easel Chart



Instructor
Note

Possible answers to include:

- Inventory might be needed in the recovery phase.
 - This is true especially on large disasters, when operations transition from State operations back to local communities.
- Lack of space for Long-Term Recovery Committees.
- Warehouse space at a premium, close to disaster site (“moves it and loses it”).
- Need to capture Long-Term Recovery materials (e.g., building materials).



- Eventually, the voluntary organizations can transition remaining goods to their own storage areas or warehouses.
- If there is not a plan on how to open, run, and close a warehouse, there will be a loss of time, money, and resources.

Visual 13: Manage Those Goods!



Activity

Manage Those Goods!

1. Review the scenario and read additional information.
2. Answer the questions/issues to consider.
3. Summarize your responses on the easel chart.
4. Be ready to report to the class.

Purpose: To select warehouse space and accept donated goods that are needed based on the details of a scenario.



Instructor Note

Refer participants to the additional scenario information for this unit.

- **Introduce** the activity.
- **Summarize** the questions for Unit 4 to the class.
- **Inform** groups to record their findings on the easel chart.
- **Circulate** among the groups to enhance discussions and findings as well as provide feedback as they are working.
- **Review** group answers with class.



Easel Chart

Directions:

- Review the scenario (in Unit 3).
- Read through the additional scenario information for this unit.
- Working with other members of your small group, answer the questions for Unit 4.
- Record your answers on the easel and be prepared to report to the class.

Additional Scenario Information:

The media message created in Unit 3 has been released. Between word-of-mouth about the fire, Tweets, blogs, local newspaper articles, and even a few TV news reports, many donors have been drawn to collect stuff from their own houses to donate.

Since the fire station is usually locked, town and area residents have started dropping off large green trash bags of donations at the local restaurant. The owner donated a 40' x 20' room to house the donations. After a day and a half, the room is full of green trash bags. Extra bags and boxes being dropped off are now being placed on the sidewalk. Two days later, the business owner says, "I'm tired of my restaurant looking like a garbage dump. You need to get that stuff out of here. I've got a party using that room in 2 days."

Questions/issues for this Unit:

- Describe your process for finding space to be used for a new collection center in your town. How would you determine what product(s) are needed by the survivors? What stakeholders would you engage in these processes?
- Based on the scenario and additional information above, list the top 10 items on your immediate “needs list” of donated items and draft another press release/Tweet in which you address these specific needs.
- What groups in your town will you involve in collection center operations and in organizing the “green trash bags” in the restaurant?
- Would you encourage survivors to come to the collection center? If yes, why? If no, what mechanism(s) would you set up for distribution?

Visual 14: Pulling it all together . . .

Preparedness/Planning

- *Know your team*
- *Establish MOUs*
- *Develop phone scripts*
- *Include SOPs*
- *Develop triggers for action*
- *Manage public education*



Review material with participants.

Instructor
Note

Visual 15: Pulling it all together . . . (Continued)

Response

Activating the plan . . .

- Public information
- Information management
- Matching needs
- Making changes as needed
- Monitoring staffing
- Working toward recovery
- Demobilizing



Instructor
Note

Review material with participants.

Point out the sample procedure for demobilizing a warehouse in Appendix A.

Discuss any personal experiences you have with collection centers and whether their operations were closed down at the appropriate time; i.e.; so they did not compete with local businesses.

Visual 16: Pulling it all together . . .

Recovery

For the long haul

- Making the transition
- Transferring management
- Appealing to public for long term
- Thanking donor
- Establishing After-Action process



Review material with participants.

Have participants turn to the sample thank you letter in Appendix B.

Instructor
Note

Visual 17: What's In Your Annex?

Does your annex:

- Discuss procedures for handling an influx of unsolicited goods?
- List a mechanism for locating collection and distribution centers?
- Designate people responsible for unsolicited goods?
- Discuss criteria for opening and closing collection and distribution centers?



Ask participants to take out their copy of the local annex and review it for the questions on the visual.

Lead a discussion and answer any questions participants may have.

Instructor
Note

Visual 18: Summary

1. Describe why cash donations are more economically feasible than donated goods.
2. Define requirements for collection centers.
3. List types of distribution centers.
4. Summarize the benefits of operating through recovery.



- **Summarize** the unit for the participants with a few key points.
- **State:** In this unit, we have had a chance to define the nature and operational procedures so necessary to donations management in a disaster.
- **Ask** for questions from the participants.
- If there are none, then State: In this unit, we explored in more depth the cost and process of managing donated goods and a strategy for setting up and operating collection and distribution centers. In Unit 5, we are going to discuss procedures to process unaffiliated volunteers and the methods used to manage the influx of goodwill converging on a community following a disaster.

Collection Center Demobilization

Closing a collection center is a matter of timing.

When the flow of donated goods coming into the center slows to small amounts of shipments on a daily basis and the number of offers coming into the call center/donation coordination team has ceased, it is time to announce the closing of the center.

Procedure:

1. Set a date (2 or more weeks in the future).
2. Announce the date to the Distribution Centers.
3. Announce the date to the media.

Prior to closing, encourage the existing Distribution Centers to stock up as much as is reasonable (based on the demand and on their space).

During the last week, make offers to local social service agencies who will be continuing to serve the communities affected by the event.

As soon as the center is empty:

- Return leased/rented/loaned equipment.
- Have phones turned off.
- Clean warehouse.
- Take down signage.
- Send volunteers home.
- Do a walk-through with owner or agent (have utilities transferred to owner/agent).
- Turn over keys.

Thank You Letter for Donations

Sample City
Main Street
Anywhere, USA
Date

Dear:
Willing Citizen
Center Street
Junction City, USA

On behalf of the , I want to personally thank you for your offer of: 3 mattresses including transportation.

Many residents of our city have been impacted heavily by the fire that destroyed the apartment building.

I just wanted to let you know how much we appreciate your willingness to make such an offer to our city's residents when they were most in need.

Sincerely,

John Stokes
Mayor
Sample City

Unit 5: Managing Spontaneous Volunteers

Unit 5: Managing Spontaneous Volunteers

Estimated Time: .75 hours

Introduction

In this unit, we will discuss the normal rush of people responding after a disaster and cover the benefits of planning for this before the disaster happens.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Differentiate between spontaneous unaffiliated and affiliated volunteers.
2. Identify process for referring donated volunteer services to voluntary agency organizations, local EMAs, and local volunteer reception centers.
3. Match offered volunteer services to needs.
4. Explain the interaction process with the local volunteer centers in the response phase.
5. Cite ways to promote public messaging about the correct way to volunteer through recovery.

Scope

- Types of Volunteers
- Preparedness
- Key Stakeholders
- Managing Spontaneous Volunteers: An Activity

References

- Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions
- [“Unaffiliated Volunteers in Response and Recovery”](http://www.volunteerflorida.org/wp-content/uploads/2013/03/UnaffiliatedVolunteers.pdf)
(<http://www.volunteerflorida.org/wp-content/uploads/2013/03/UnaffiliatedVolunteers.pdf>) by Volunteer Florida: the Governor’s Commission on Volunteerism and Community Service
- E0489, Management of Spontaneous Volunteers in Disasters, EMI, April 2011

Methodology

- Interactive discussion
- Small group, scenario-based activity

Before Teaching This Unit

- Research and have information available for participants about the protection against liabilities for organizations and volunteers in your State.

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Types of Volunteers	5 minutes
Preparedness	10 minutes
Key Stakeholders	10 minutes
Managing Spontaneous Volunteers: An Activity	15 minutes
Unit Summary	3 minutes
TOTAL UNIT	45 minutes

Visual 1: Managing Unaffiliated Volunteers

Managing Unaffiliated Volunteers



Instructor
Note

Visual 2: Objectives

1. Differentiate between spontaneous and affiliated volunteers.
2. Identify process for referring donated volunteer services to voluntary agency organizations, local EMAs, and local volunteer reception centers.
3. Match offered volunteer services to needs.



Review objectives with the participants.

Explain that we will address volunteer services from individuals, groups, professions, and people with special skills.

Instructor
Note

Visual 3: Objectives (Continued)

4. Explain the interaction process with the local volunteer centers in the response phase.
5. Cite ways to promote public messaging about the correct way to volunteer through recovery.



Review objectives with the participants.

Instructor
Note

Visual 4: Traditional Affiliated Volunteers

- Are attached to a voluntary agency
- Normally trained for disaster response by their agency
- Logistical support is provided



One type of volunteer is the traditional affiliated volunteer. They are beneficial in that:



- They are already part of a voluntary agency and less likely to self-deploy.
- They are trained and liability insurance is covered by their agency.
- Their feeding, housing, and transportation are provided.

Since affiliated volunteers are already part of a larger organization, their needs are taken care of. Their organizations should already be a part of your plan.



Discussion
Question

Ask: Has anyone had experience working with affiliated volunteers in a disaster? Unaffiliated, spontaneous volunteers? If so, **ask** them for benefits and challenges.



Easel Chart

Capture key points on an easel and refer back to them during the rest of the unit.

Visual 5: Unaffiliated Volunteers

- *No association with voluntary organization*
- *Feel motivated by degree of community ownership*
- *They may be highly skilled:*
 - *Accountant*
 - *Construction*
 - *Food Services*
 - *Information Technology*
- *Commonly known as Spontaneous*



Another type of volunteer is the spontaneous or unaffiliated volunteer. These volunteers:

- Have no association with a voluntary organization.
- Want to help their community.
- Bring many different skills to the table.



In disaster operations, one of the most important aspects of these volunteers is for a community to coordinate a way to match them with a voluntary organization and transition them from unaffiliated to affiliated.

This is often done through regular and social media releases that announce the details of how to serve as a volunteer with a local organization.

It is not the job of the VDCT to transition them to the disaster response, but the job of the organization with whom they want to affiliate.

Visual 6: Unaffiliated Volunteers (Continued)

- May not have skills relevant to current disaster
- Must be a major consideration for the annex or EOP
- Could include convergent groups
 - No affiliation with emergency management
 - Individual or group acts independently outside the recognized coordination of the impacted jurisdiction

These volunteers:



- May have varied skills but those may not be conducive to the mission.
- Will show up, therefore you must address them in planning.
- It may be tempting to look at spontaneous volunteers as a problem, but you need to reframe them as a resource. Work closely with the VOAD lead in the EOC or Emergency Manager to see what jobs have priorities and if you can use them to fill those jobs.
- Can include convergent groups. These groups:
 - Have no affiliation with an emergency management group and should be addressed in your plan.
 - May have liability insurance. If they do not, treat them as spontaneous volunteers and match them with an affiliated group.



Instructor
Note

Explain that the one day FEMA course, E/L 489, Management of Spontaneous Volunteers in Disasters, covers these issues in detail.

Encourage participants to take the course.

Visual 7: Public Perception

Well-managed volunteers:

- Contribute to a positive public perception of the response and recovery effort
- Can fill in the gaps and meet individual needs of survivors, offer comfort and encouragement



Well-managed spontaneous volunteers can create a positive public perception of disaster relief efforts. This perception is important because:



- The press may interview individuals or organizations.
- Volunteers may want to volunteer again or become affiliated.
- Volunteers will tell others about the organization they worked with.

It may encourage others who have not volunteered or donated before to contribute to current or future disasters.



Reference: Unaffiliated Volunteers in Response and Recovery by Volunteer Florida: The Governor's Commission on Volunteerism and Community Service.

Instructor
Note



[Unaffiliated Volunteers in Response and Recovery](http://www.volunteerflorida.org/wp-content/uploads/2013/03/UnaffiliatedVolunteers.pdf)

(<http://www.volunteerflorida.org/wp-content/uploads/2013/03/UnaffiliatedVolunteers.pdf>)

Print this out as a handout or give the Website address to the class.

Visual 8: General Planning Before a Disaster

- Identify existing local volunteer coordination processes and protocols
 - Identify a volunteer intake coordinating agency
 - Determine location for physical intake
 - Establish MOUs with organizations
 - E.g., who will staff the VRC
-
- The location, agency, and person you will refer volunteers to should all be in your plan.
 - Community centers and faith-based campuses are good for Volunteer Reception Centers (VRCs) because they often have:
 - Large open rooms
 - Adequate parking
 - Sanitary facilities
 - Venues to be used for VRCs should be targeted for priority restoration of utilities.
 - Wherever your facility, establish one entrance and a separate exit to create flow.
 - Schools are not good locations because they are often used for shelters.
 - Memorandums of Understanding (MOUs) with stakeholders should be in your annex or emergency plan.
 - Tap into existing resources; do not reinvent the wheel.



Visual 9: General Planning Before a Disaster (Continued)

- Educate local coalitions and community members
- Build a community network Engage the business community
- Establish reporting procedures

Planning involves:



- Knowing the agencies working the disaster in order to determine which volunteers will be referred to them based on the agencies' needs and the volunteers' skills.
 - Organizations may have specific needs, such as volunteers for populations with access or functional needs or animal needs.
 - Agreements to be made ahead of time.
- Referring to legal counsel about liability issues.
- Discovering one organization in the community that is a logical choice for coordinating the multi-agency utilization of spontaneous volunteers.

Visual 10: General Planning Before a Disaster (Continued)

- Educate local coalitions and community members
- Build a community network
- Engage the business community
- Establish reporting procedures

Planning involves:

- Being proactive in the community. Attend local community meetings or visit local stores.
- Contacting organizations that may not be a part of emergency management.
- Contacting local businesses that may have existing volunteers, donate goods, or offer discounts during times of disasters.
 - According to a survey by Deloitte and The Conference Board, 77% of companies believe volunteer programs can help them improve their business practices and nearly 50% said aligning their giving programs—including volunteering—with business objectives was the biggest change in their philanthropy. (Talent Management Magazine, April 2009 issue)
- Establishing reporting procedures to track the number of volunteers that show up, call in, or are referred to an organization. Keep track of volunteer hours.



Instructor
Note

Explain if you prepare for volunteers in the preparedness phase, you will be ready for them when a disaster happens.

Explain best practices for maintaining track of volunteer hours that you have used.

Visual 11: Key Stakeholders in Managing Unaffiliated Volunteers

- *Emergency management*
- *Volunteer center(s)*
- *VOAD members*
- *Faith-based organizations*
- *Community leaders*
- *Corporate and business partners*
- *Media*



Ask: So where do you start in formulating or revising your plan?

Mention other potential partners like:



Instructor
Note

- Universities and Schools
- Citizen Corps
- Ethnic associations
- Functional needs groups
- Senior programs
- Hospitals
- Professionals in volunteer coordination
- Health Department
- Civic Groups
- National Service programs
- Social Services



- It is beneficial to identify all potential partners and build cooperative relationships with organizations such as these listed on the visual.
- Document the number of volunteers your organization has and what they do for your organization. Use this information as you work with community leaders to demonstrate the benefits volunteers give to the community through your organization. This may help garner assistance from the community when needs arise.

Visual 12: Volunteer Management - Questions to Consider

- How will volunteers be supervised?
- Will there be liability coverage for the volunteers? How? In what circumstances?
- How will hours be tracked for a potential soft match against the State's cost share for the disaster?



Point out the protections against liabilities offered by Public Law 105-19, The Volunteer Protection Act of 1997, Appendix B, Unit 5.

Explain that reimbursement includes material in Disaster Assistance Policy (DAP 9525.2), Appendix E, Unit 2.

Instructor
Note



- A great Website: <http://www.nonprofitrisk.org>
 - On this site, you can find laws for each State on liability for volunteer organizations.
 - You should know the law in your particular State.

Visual 13: Managing Unaffiliated Volunteers: An Activity



Activity

Managing Unaffiliated Volunteers:

- Review the scenario and additional information
- Answer the questions/issues to consider
- Summarize your responses on the easel chart
- Be ready to report to the class

Purpose: To determine your role in the process of managing spontaneous volunteers.



Instructor
Note

Refer participants to the scenario information.

Introduce the exercise.

Summarize the questions for Unit 5 to the class.

Inform groups to record their findings on the easel chart.

Circulate among the groups to enhance discussions and findings as well as provide feedback.

After the time is up, **go through** the questions with the group and have the participants present their answers in class.



Easel Chart

Directions:

- Review the scenario (in Unit 3).
- Read through the additional scenario information for this unit.
- Working with other members of your small group, answer the questions for Unit 5.
- Record your answers on the easel and be prepared to report to the class.

ADDITIONAL SCENARIO INFORMATION FOR THIS UNIT

Even though a media message including information about volunteers was released in Unit 3, spontaneous unaffiliated volunteers are hanging around, wanting to help. At least 2 dozen people are milling around the burned out apartment building, but no one is directing them. Over the next few days, others volunteer their services to help people left homeless by the fire. No one has a structured process in place for managing or coordinating the spontaneous volunteers.

Questions/issues for this Unit to be addressed by the group:

- Spontaneous volunteers will need to be coordinated. What key stakeholders from your community would you collaborate with and what would be their role?
- What tasks could these volunteers undertake?

Visual 14: What's In Your Annex?

Does your annex:

- List key stakeholders for management of unaffiliated volunteers?
- Set up a VRC or similar mechanism?



Instructor
Note

Ask participants to take out their copy of the local annex and review it for the questions on the visual.

Lead a discussion and answer any questions participants may have.

Visual 15: Summary

1. Differentiate between spontaneous unaffiliated and affiliated volunteers.
2. Identify process for referring donated volunteer services to voluntary agency organizations, local EMAs, and local volunteer reception centers.
3. Match offered volunteer services to needs.

Visual 16: Summary

4. Explain the interaction process with the local volunteer centers in the response phase.
5. Cite ways to promote public messaging about the correct way to volunteer through recovery.

Summarize the unit for the participants with a few key points.

State: In this unit, we have had a chance to define the nature and operational procedures so necessary to spontaneous volunteer management in a disaster.



Ask for questions from the participants.

If there are none, then ***state:*** In this unit, we explored in more depth the definitions of unaffiliated/spontaneous volunteers and the process and guidelines of managing spontaneous volunteers.

In Unit 6, we are going to discuss undesignated cash offers.

PUBLIC LAW 105-19–JUNE 18, 1997

VOLUNTEER PROTECTION ACT OF 1997

Volunteer Protection Act of 1997

This is the text of Public Law 105-19; the Volunteer Protection Act of 1997 as signed into law by President Clinton on June 18, 1997:

One Hundred Fifth Congress of the United States of America

AT THE FIRST SESSION

Begun and held at the City of Washington on Tuesday, the seventh day of January, one thousand nine hundred and ninety-seven

An Act

To provide certain protections to volunteers, nonprofit organizations, and governmental entities in lawsuits based on the activities of volunteers.

Be it enacted by the Senate and House of Representatives of the United States Of America in Congress assembled,

SECTION 1. SHORT TITLE.

This Act may be cited as the “Volunteer Protection Act of 1997”.

SECTION 2. FINDINGS AND PURPOSE.

(a) FINDINGS—The Congress finds and declares that—

- (1) the willingness of volunteers to offer their services is deterred by the potential for liability actions against them;
- (2) as a result, many nonprofit public and private organizations and governmental entities, including voluntary associations, social service agencies, educational institutions, and other civic programs, have been adversely affected by the withdrawal of volunteers from boards of directors and service in other capacities;
- (3) the contribution of these programs to their communities is thereby diminished, resulting in fewer and higher cost programs than would be obtainable if volunteers were participating;
- (4) because Federal funds are expended on useful and cost-effective social service programs, many of which are national in scope, depend heavily on volunteer participation, and represent some of the most successful public-private partnerships, protection of volunteerism through clarification and limitation of the personal liability risks assumed by the volunteer in connection with such participation is an appropriate subject for Federal legislation;
- (5) services and goods provided by volunteers and nonprofit organizations would often otherwise be provided by private entities that operate in interstate commerce;
- (6) due to high liability costs and unwarranted litigation costs, volunteers and nonprofit organizations face higher costs in purchasing insurance, through interstate insurance markets, to cover their activities; and

(7) clarifying and limiting the liability risk assumed by volunteers is an appropriate subject for Federal legislation because--

(A) of the national scope of the problems created by the legitimate fears of volunteers about frivolous, arbitrary, or capricious lawsuits;

(B) the citizens of the United States depend on, and the Federal Government expends funds on, and provides tax exemptions and other consideration to, numerous social programs that depend on the services of volunteers;

(C) it is in the interest of the Federal Government to encourage the continued operation of volunteer service organizations and contributions of volunteers because the Federal Government lacks the capacity to carry out all of the services provided by such organizations and volunteers; and

(D)(i) liability reform for volunteers, will promote the free flow of goods and services, lessen burdens on interstate commerce and uphold constitutionally protected due process rights; and (ii) therefore, liability reform is an appropriate use of the powers contained in article 1, section 8, clause 3 of the United States Constitution, and the fourteenth amendment to the United States Constitution.

(b) **PURPOSE**—The purpose of this Act is to promote the interests of social service program beneficiaries and taxpayers and to sustain the availability of programs, nonprofit organizations, and governmental entities that depend on volunteer contributions by reforming the laws to provide certain protections from liability abuses related to volunteers serving nonprofit organizations and governmental entities.

SECTION 3. PREEMPTION AND ELECTION OF STATE NONAPPLICABILITY.

(a) **PREEMPTION**—This act preempts the laws of any State to the extent that such laws are inconsistent with this Act, except that this Act shall not preempt any State law that provides additional protection from liability relating to volunteers or to any category of volunteers in the performance of services for a nonprofit organization or governmental entity.

(b) **ELECTION OF STATE REGARDING NONAPPLICABILITY**—This Act shall not apply to any civil action in a State court against a volunteer in which all parties are citizens of the State if such State enacts a statute in accordance with State requirements for enacting legislation—

(1) citing the authority of this subsection;

(2) declaring the election of such State that this Act shall not apply, as of a date certain, to such civil action in the State; and

(3) containing no other provisions.

SECTION 4. LIMITATION ON LIABILITY FOR VOLUNTEERS.

(a) **LIABILITY PROTECTION FOR VOLUNTEERS**—Except as provided in subsections (b) and (d), no volunteer of a nonprofit organization or governmental entity shall be liable for harm caused by an act or omission of the volunteer on behalf of the organization or entity if—

(1) the volunteer was acting within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity at the time of the act or omission;

(2) if appropriate or required, the volunteer was properly licensed, certified, or authorized by the appropriate authorities for the activities or practice in the State in which the harm

occurred, where the activities were or practice was undertaken within the scope of the volunteer's responsibilities in the nonprofit organization or governmental entity;

(3) the harm was not caused by willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual harmed by the volunteer; and

(4) the harm was not caused by the volunteer operating a motor vehicle, vessel, aircraft, or other vehicle for which the State requires the operator or the owner of the vehicle, craft, or vessel to—

(A) possess an operator's license; or

(B) maintain insurance. (A) Possess an operator's license; or (B) Maintain insurance

(b) **CONCERNING RESPONSIBILITY OF VOLUNTEERS TO ORGANIZATIONS AND ENTITIES**—Nothing in this section shall be construed to affect any civil action brought by any nonprofit organization or any governmental entity against any volunteer of such organization or entity.

(c) **NO EFFECT ON LIABILITY OF ORGANIZATION OR ENTITY**—Nothing in this section shall be construed to affect the liability of any nonprofit organization or governmental entity with respect to harm caused to any person.

(d) **EXCEPTIONS TO VOLUNTEER LIABILITY PROTECTION**—If the laws of a State limit volunteer liability subject to one or more of the following conditions, such conditions shall not be construed as inconsistent with this section:

(1) A State law that requires a nonprofit organization or governmental entity to adhere to risk management procedures, including mandatory training of volunteers.

(2) A State law that makes the organization or entity liable for the acts or omissions of its volunteers to the same extent as an employer is liable for the acts or omissions of its employees.

(3) A State law that makes a limitation of liability inapplicable if the civil action was brought by an officer of a State or local government pursuant to State or local law.

(4) A State law that makes a limitation of liability applicable only if the nonprofit organization or governmental entity provides a financially secure source of recovery for individuals who suffer harm as a result of actions taken by a volunteer on behalf of the organization or entity. A financially secure source of recovery may be an insurance policy within specified limits, comparable coverage from a risk pooling mechanism, equivalent assets, or alternative arrangements that satisfy the State that the organization or entity will be able to pay for losses up to a specified amount. Separate standards for different types of liability exposure may be specified.

(e) **LIMITATION ON PUNITIVE DAMAGES BASED ON THE ACTIONS OF VOLUNTEERS**—

(1) **GENERAL RULE**—Punitive damages may not be awarded against a volunteer in an action brought for harm based on the action of a volunteer acting within the scope of the volunteer's responsibilities to a nonprofit organization or governmental entity unless the claimant establishes by clear and convincing evidence that the harm was proximately

caused by an action of such volunteer which constitutes willful or criminal the individual harmed.

(2) CONSTRUCTION—Paragraph (1) does not create a cause of action for punitive damages and does not preempt or supersede any Federal or State law to the extent that such law would further limit the award of punitive damages.

(f) EXCEPTIONS TO LIMITATIONS ON LIABILITY—

(1) IN GENERAL—The limitations on the liability of a volunteer under this Act shall not apply to any misconduct that—

(A) constitutes a crime of violence (as that term is defined in section 16 of title 18, United States Code) or act of international terrorism (as that term is defined in section 2331 of title 18) for which the defendant has been convicted in any court;

(B) constitutes a hate crime (as that term is used in the Hate Crime Statistics Act (28 U.S.C. 534 note));

(C) involves a sexual offense, as defined by applicable State law, for which the defendant has been convicted in any court;

(D) involves misconduct for which the defendant has been found to have violated a Federal or State civil rights law; or

(E) where the defendant was under the influence (as determined pursuant to applicable State law) of intoxicating alcohol or any drug at the time of the misconduct.

(2) RULE OF CONSTRUCTION- Nothing in this subsection shall be construed to effect subsection (a) (3) or (e).

SECTION 5. LIABILITY FOR NONECONOMIC LOSS.

(a) GENERAL RULE- In any civil action against a volunteer, based on an action of a volunteer acting within the scope of the volunteer's responsibilities to a nonprofit organization or governmental entity, the liability of the volunteer for noneconomic loss shall be determined in accordance with subsection (b).

(b) AMOUNT OF LIABILITY—

(1) IN GENERAL—Each defendant who is a volunteer, shall be liable only for the amount of noneconomic loss allocated to that defendant in direct proportion to the percentage of responsibility of that defendant (determined in accordance with paragraph (2)) for the harm to the claimant with respect to which that defendant is liable. The court shall render a separate judgment against each defendant in an amount determined pursuant to the preceding sentence.

(2) PERCENTAGE OF RESPONSIBILITY—For purposes of determining the amount of noneconomic loss allocated to a defendant who is a volunteer under this section, the trier of fact shall determine the percentage of responsibility of that defendant for the claimant's harm.

SECTION 6. DEFINITIONS.

For purposes of this Act:

(1) **ECONOMIC LOSS**—The term “economic loss” means any pecuniary loss resulting from harm (including the loss of earnings or other benefits related to employment, medical expense loss, replacement services loss, loss due to death, burial costs, and loss of business or employment opportunities) to the extent recovery for such loss is allowed under applicable State law.

(2) **HARM**—The term “harm” includes physical, nonphysical, economic, and noneconomic losses.

(3) **NONECONOMIC LOSSES**—The term “noneconomic losses” means losses for physical and emotional pain, suffering, inconvenience, physical impairment, mental anguish, disfigurement, loss of enjoyment of life, loss of society and companionship, loss of consortium (other than loss of domestic service), hedonic damages, injury to reputation and all other nonpecuniary losses of any kind or nature.

(4) **NONPROFIT ORGANIZATION**- The term nonprofit organization means—

(A) any organization which is described in section 501(c)(3) of the Internal Revenue Code of 1986 and exempt from tax under section 501(a) of such Code and which does not practice any action which constitutes a hate crime referred to in subsection (b)(1) of the first section of the Hate Crime Statistics Act (28 U.S.C. 534 note); or

(B) any not-for-profit organization which is organized and conducted for public benefit and operated primarily for charitable, civic, educational, religious, welfare, or health purposes and which does not practice any action which constitutes a hate crime referred to in subsection (b)(1) of the first section of the Hate Crime Statistics Act (28 U.S.C. 534 note).

(5) **STATE**—The term “State” means each of the several States, the District of Columbia, the Commonwealth of Puerto Rico, the Virgin Islands, Guam, American Samoa, the Northern Mariana Islands, any other territory or possession of the United States, or any political subdivision of any such State, territory, or possession.

(6) **VOLUNTEER**—The term “volunteer” means an individual performing services for a nonprofit organization or a governmental entity who does not receive—

(A) compensation (other than reasonable reimbursement or allowance for expenses actually incurred); or

(B) any other thing of value in lieu of compensation, in excess of \$500 per year, and such term includes a volunteer serving as a director, officer, trustee, or direct service volunteer.

SECTION 7. EFFECTIVE DATE.

(a) **IN GENERAL**—This Act shall take effect 90 days after the date of enactment of this Act.

(b) **APPLICATION**—This Act applies to any claim for harm caused by an act or omission of a volunteer where that claim is filed on or after the effective date of this Act but only if the harm that is the subject of the claim or the conduct that caused such harm occurred after such effective date.

Unit 6: Managing Undesignated Cash

Unit 6: Managing Undesignated Cash

Estimated Time: .75 hours

Introduction

In this unit, we will discuss what to do with the undesignated cash and you will practice making decisions during an activity.

Objectives

At the conclusion of this unit, the participants will be able to:

1. Analyze why cash is the best of all potential donations.
2. Develop a policy for referring cash donations to appropriate local organizations.
3. Write guidelines to encourage donors to give cash to acknowledged voluntary organizations.

Scope

- Why Cash is Best
- Who Should Get Cash?
- What to Do With All That Cash: An Activity

Methodology

- Interactive discussion
- Small group, scenario-based activity

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Why Cash is Best	5 minutes
Who Should Get Cash?	10 minutes
What to Do With All That Cash: An Activity	25 minutes
Unit Summary	3 minutes
TOTAL UNIT	45 minutes

Visual 1: Managing Undesignated Cash



Instructor
Note

Remind the participants that the most important message to give to the public and the media is that cash is the preferred donation.

Ask: “What are the benefits of cash that make it so important?”



- There may be undesignated cash coming into local government offices.
- The government is encouraged to provide those funds to Long-Term Recovery Groups. It is important that donors feel confident their cash donations will be used to meet the needs of survivors.
- To assist with building this confidence, it is important to tell prospective donors about the kinds of services provided by voluntary organizations.

Visual 2: Objectives

1. Analyze why cash is the best of all potential donations.
2. Develop a policy for referring cash donations to appropriate local organizations.
3. Write guidelines to encourage donors to give cash to acknowledged voluntary organizations.



Review objectives with the participants.

Instructor
Note

Visual 3: Discussion: VOAD Donations



"Why should every effort be made to encourage the public to donate cash to voluntary organizations?"


Discussion
Question



Do not show the next visual until after the discussion.

Instructor
Note

Visual 4: Cash is Preferred

- Helps voluntary agencies meet precise needs
 - Helps rebuild local economy
 - Allows for:
 - Equitable disbursement procedures
 - Standard accounting procedures
 - Provides support for Long-Term Recovery Committees
 - Is more efficient to inventory cash than stuff
-
- 
- Voluntary organizations are the ideal recipients of cash donations from the public because they provide numerous services to the most affected disaster population with little red tape. Practically all assistance, including volunteer labor provided by voluntary organizations, is provided for free.
 - Voluntary organizations are usually aware of specific items needed by the survivors of the disaster—whether it be food, baby products, cleaning supplies, or other items.
 - Receiving cash avoids the often difficult and labor-intensive task of sorting, storing, re-packaging, and re-shipping donated goods at a collection center or warehouse.
 - Putting money back into the local economy helps those communities recover faster from the disaster. When donated goods are received, it can compete with local businesses.

Visual 5: Which Cash Recipients Are Best?

- National VOAD guidelines
 - Always encourage donations to VOAD organizations active in the response efforts
- Many organizations have existing Disaster Relief Funds
- Mayor or Chief Executive may decide to create a "Disaster Relief Fund"
 - Provides potential donors with another option for giving to help meet immediate and/or long-term needs of disaster survivors



Instructor
Note

Refer to the National VOAD guidelines in Appendix A of Unit 6.

Mention that some local affiliates of national organizations do not have the authority to solicit or receive cash; however, they can accept at the national level.



- The overarching guidance from National VOAD for cash donations is to ALWAYS encourage cash donations be made to voluntary organizations.
- Many National VOAD organizations have been able to help many people get their lives back to normal by using cash donations.
- While the overarching guidance is important, the messaging shared with the media after a disaster is just as important. The cash donations message MUST be a consistent one used by everyone each time they talk with the media.
- While cash donations to voluntary organizations are preferred, some cities and counties may create their own disaster relief fund as another option for potential donors. The thought behind the creation of such a fund is that donors might donate to a Mayor's Fund who wouldn't normally donate cash to a voluntary organization.
- While setting up such funds may not be recommended, your community may choose to create one after a disaster. As the Local Volunteer and Donations Coordinator, you may be asked to manage or provide assistance in the operation of the Fund.
- Determine where those funds will be used BEFORE a disaster. The recommendation is that you have, in writing, where those monies will be channeled. The best place is to the Long-Term Recovery Groups.
- Have clear guidance on the subject of how cash donations are helpful to all stakeholders.
- Your policy should be clear on how cash donations are processed.

Visual 6: Challenges: Voluntary Organizations versus Local Government Fund

- Management
 - Organization has pre-determined staffing; Local Government might not
- Processes
 - Organization has established processes; Local Government has to develop
- Disbursement of funds
 - Organization has established guidelines; Local Government has to develop
- Accountability
 - Organization knows when and what needs to be reported to the IRS, donors, etc. and when it should be reported; Local Government might not



Instructor
Note

Emphasize that the main thing to remember about a Local Government-managed fund is that it **MUST** be transparent at all times.

Point out that if there is a board to manage funds, the State VOAD members should be included as participants.



- There are challenges for funds managed by the government. Donors' money given to a government fund is not tax deductible. Some communities cannot take donations.
- A reputable voluntary organization that accepts cash donations has probably been doing that for a while. This could be something new to your government. Keep in mind the fund will likely be created in the middle of a disaster when stress levels and work responsibilities are already elevated.
- If a voluntary organization has accepted cash donations previously, those processes are already in place. The government has to take time to create its fund and develop an entire process for receiving, receipting, and depositing donations.

Visual 7: Cash and Long-Term Recovery

For a local disaster without State involvement:

- Funds may go into an account
 - Ministerial association
 - United Way
 - Other non-profit organizations
- Funds can then be directed to non-profits involved in long-term recovery efforts



Explain the recovery period can be anywhere from 18 months to 2 years.

Instructor
Note



- Cash is very important for long-term recovery efforts.
- Funds may go into the account of any “tax-free” voluntary organization that is willing to act as the fiscal agent for the funds once agreed on by the Long-Term Recovery Group.

Visual 8: What to Do With All That Cash



Activity

What to Do With All That Cash

- Review the scenario and the additional information
- Answer the questions/issues to consider
- Summarize your response on the easel chart
- Be ready to report to the class

Purpose: To determine the most efficient process for handling cash donations based on a scenario.



Easel Chart

Directions:

- Review the scenario and read the additional information.
- Working with other members of your small group, answer the questions for Unit 6.
- Record your answers on the easel and be prepared to report to the class.

ADDITIONAL SCENARIO INFORMATION FOR THIS UNIT

Another message has been released in the local media about donated cash vs. donated goods. While the message is clear that cash is best, several voluntary organizations are each receiving funds. To date, there is no central accounting or management. Rumors say there is more than \$35,000 that has been collected just 4 days after the fire, but no one can verify that amount or state how it is being used.

Questions/issues for this Unit to be addressed by the group:

- What is the best way to handle this situation based on the particulars in your community? Would you put one group in charge of the cash? What process would you use to ensure that all survivors' needs are being addressed?

Visual 9: What's In Your Annex?

Does your annex:

- State assumptions about cash?
- Discuss a policy for preference for cash?
- Specify a process for referring cash donations to various voluntary organizations?



Ask participants to take out their copy of the local annex and review it for the questions on the visual.

Lead a discussion and answer any questions participants may have.

Instructor
Note

Visual 10: Summary

1. Analyze why cash is the best of all potential donations.
2. Develop a policy for referring cash donations to appropriate local organizations.
3. Write guidelines to encourage donors to give cash to acknowledged voluntary organizations.



Ask for questions from the participants.

Instructor
Note

Summarize the unit for the participants with a few key points.



- In this unit, we have had a chance to understand why cash is the preferred donation, and to identify the challenges of undesignated cash management in a disaster.
- In this unit, we explored in more detail the systems available to manage undesignated cash.



In Unit 7, we are going to discuss the types of systems that assist in managing information so necessary to a disaster operation.

NVOAD Disaster Donation Policy

To: State and Local Officials

Subject: Disaster Donation Policy

National Voluntary Organizations Active in Disaster Background:

When disaster strikes—whether flood, hurricane, earthquake, or explosion—lives, homes, communities, and businesses may be damaged or destroyed. The people affected often need serious and substantial short- and long-term help to put their lives back together. Federal, State, and local governments supply resources; voluntary organizations also provide money, volunteers, material necessities, and a variety of expertise.

After Hurricane Camille (1969), it became clear to organizations that regularly helped disaster survivors that their services were frequently duplicated and uncoordinated. For example, two organizations would be feeding disaster survivors on opposite corners. Representatives from seven organizations began to meet on a regular basis to share their respective activities, concerns, and frustrations in disaster response. They developed the National Voluntary Organizations Active in Disaster (National VOAD), which now has almost 40 members. In addition, there are VOADs in all of the States and most of the territories.

After Hurricane Andrew (1992), the VOAD movement extended to the local level. Disaster response organizations in regions hit by the disaster learned that cooperation at the regional, county, or metro-area level was crucial. In Florida, for example, the disaster did not affect the entire State, just the far south. It made sense for local groups to convene locally instead of in the State capital. In 1996, serving local VOADs became part of the official mission of National VOAD.

Issue Background:

Voluntary organizations operate on budgets based on donations from members, from private and public institutions, and from the general public. During times of disasters, many donors are motivated to contribute to voluntary organizations that perform disaster services. These donations make it possible for voluntary organizations to provide urgently needed services to disaster victims. Government agencies at all levels depend on the relief efforts of voluntary agencies to provide immediate relief, as well as mid- and long-term assistance. These private resources augment assistance from the government. Without voluntary organization assistance and the labor of volunteers, government would be faced with many more demands on their scarce resources.

The Current Issue:

In the last few years, several State Governments and other political jurisdictions have solicited or received donations from companies and the public following a disaster. Several Government agencies have established 800 telephone numbers to coordinate or solicit donations. Government “competition” for private donations has decreased the amount of cash available to voluntary organizations, thus negatively impacting the ability of voluntary organizations to provide emergency relief and rehabilitation.

National VOAD Position and Recommendation:

National VOAD and its members want State Governors and their Offices of Emergency Management to understand the potentially serious negative impact of their donation management policies. Government solicitation or receipt of public donations after a disaster negatively impacts the ability of voluntary agencies to respond to the immediate and urgent needs of disaster victims. National VOAD urges States to recognize the national Donation Management Policy of the Federal Emergency Management Agency (FEMA) and adopt the following policies related to Cash Donations following a disaster:

State Governments should establish policies that refer potential donors to voluntary organizations that are providing services to disaster victims; and States should not solicit or accept private donations from the public. State Governments should encourage local jurisdictions to establish similar policies and procedures. In the event that cash donations are received by a State or local government agency, decisions about the distribution of such contributions should be referred to a public-private group with established criteria for distributing these funds.

We believe that this policy will result in more contributions and fewer conflicts among organizations that are now supporting government in assisting disaster victims. Additionally, to support this policy, National VOAD will encourage every State VOAD to have representation on the State Donations Coordination Team. This in turn will assure participation in the ongoing planning efforts of the State Government to address issues of donations management. National VOAD and VOAD members are available to assist government jurisdictions to: develop their donation management plans; establish procedures for managing phone banks; and conduct training courses for staff working in donation management.

Sincerely,

The National VOAD Board of Directors

Unit 7: Information Management

Unit 7: Information Management

Estimated Time: 1 hour

Introduction

In this unit, we will talk about methods for handling the potential massive amount of offers of donations and volunteers and matching them with needs of non-profits serving disaster survivors.

Objectives

At the conclusion of this unit, you will be able to: 1. Describe what technologies can be used to accept and track offers. 2. Establish procedures for matching offers to the needs identified. 3. Identify information management system(s) to help match offered resources to identified needs.

Scope

- Volunteer and Donations Process
- Automated Information Management
- Post-Course Assessment

References

If applicable, discuss how the information management software (if used by the local jurisdiction) intersects with emergency management needs exhibited on other local systems like Web EOC.

Before Teaching This Unit

- If your State uses its own NDMN portal for locals, you should demonstrate the software and discuss its use in your jurisdiction.
- Find out what computer systems are used by participants in the class. If it makes sense, ensure that you have a copy of that software that you can demonstrate to those who are not using that system.
- Make copies of the post-course assessment and answer sheet for each participant.

Methodology

- Interactive discussion, potential computer demonstration.

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Information Management	30 minutes
Automated Information Management	10 minutes

Time Plan	
Unit Summary	3 minutes
Post-Course Assessment	15 minutes
TOTAL UNIT	60 minutes

Visual 1: Information Management



Introduce the unit.

Instructor
Note

Visual 2: Objectives

1. Describe what technologies can be used to accept and track offers.
2. Establish procedures for matching offers to the needs identified.
3. Identify information management system(s) to help match offered resources to identified needs.



Review objectives with the participants.

Instructor
Note

Visual 3: Discussion Questions



Discussion
Question

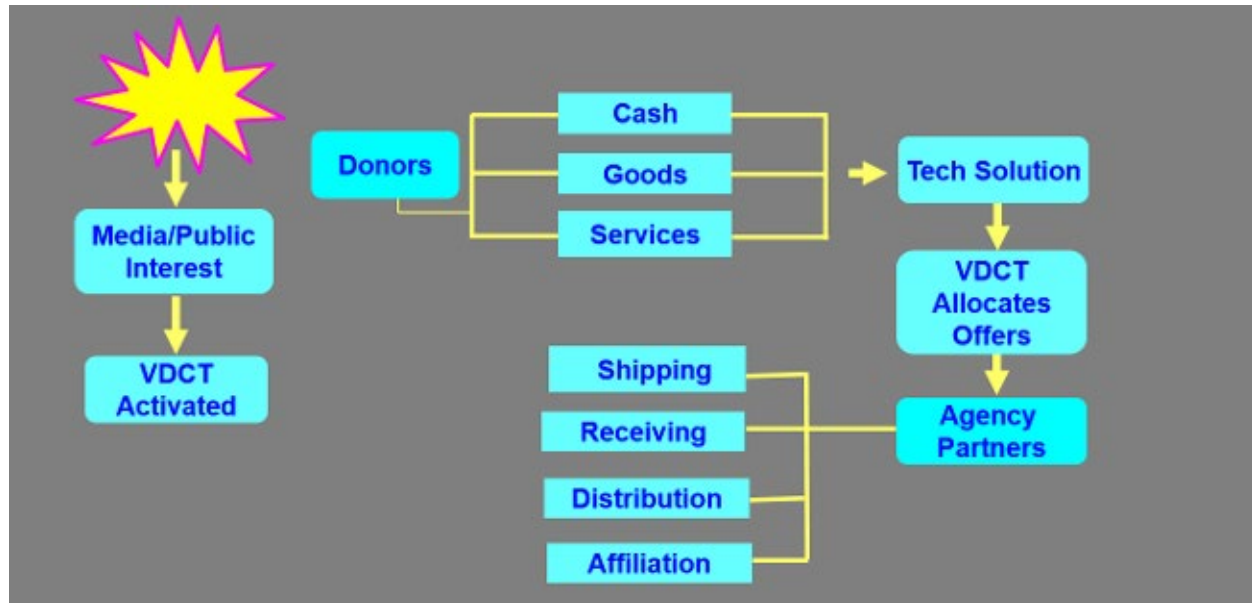
- Why is it best for local jurisdictions to match offers to needs instead of managing stuff and people?
- How do local jurisdictions match offers to needs?



Instructor
Note

Lead a discussion on these questions with the participants.

Visual 4: Volunteer and Donations Process



Volunteer and Donations Process Description

Media/Public Interest leads to VDCT Activated. There is a chart showing blocks connected by lines and arrows. The first block is Donors with lines leading to 3 blocks for Cash, Goods, and Services. All three of those blocks have an arrow pointing to a block that says Tech Solution. From there, an arrow points to a block that says VDCT Allocates Offers, and from that, an arrow points to a block for Agency Partners. From Agency Partners, there are lines to 4 separate blocks that read Shipping, Receiving, Distribution, and Affiliation.



Instructor
Note

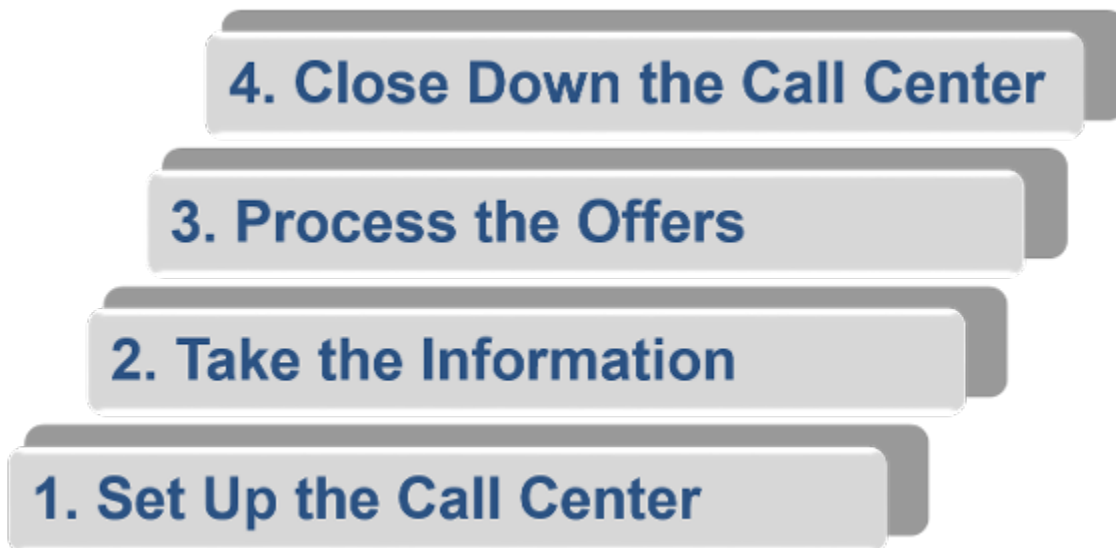
Mention that there are several technology solutions for managing all this information.

Mention that Private Non-Profits (PNP) are the most likely organizational partners that would accept and manage the donations.

Clarify that the operation will expand or contract as necessary.

Visual 5: Information Management Operations

Four Steps:



Instructor
Note

Ask, How would media attention drive the need for a phone bank call center? Does your local jurisdiction have plans to use a Website to help manage offers of donations?



- In information management, Steps 1, 2, and 4 are specific to the call center or Website. Step 3, Process the Offers, is handled by the VDCT.
- The phone bank is a physical place within a call center.
 - This is where operators answer the donations toll-free number. Therefore, a call center can be a larger operation that encompasses a phone bank. In addition to a phone bank, a call center can also support other areas such as meeting rooms, break room, offices, etc.
 - Call centers may have as few as 1 to 2 people during a small disaster and up to 30 in a large disaster.

Visual 6: The Need for a Call Center

Determined by:

- Media attention
- An overwhelming number of phone calls to the EOC and agencies offering donations



Review the need for a call center.

Instructor
Note

Visual 7: Set Up the Call Center

Considerations:

- Space/location
- Hours of operation
- Equipment
- Personnel
- Key messages
- *Training*

1. Set Up the Call Center



Ask some of the questions below to enhance class participation.

Instructor
Note

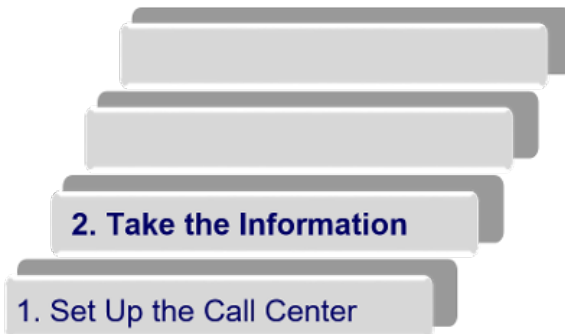


- During the initial operations, it is necessary to look at the space to determine if the location will adequately support the phone bank. If you have a Website, do you have the capacity and people to handle the offers of goods and services?
 - Where are you going to set up the call center?
 - How many phone calls/messages do you anticipate?
 - What kind of amenities will you need?
 - What are the hours of operation?
 - What is the accessibility into the building?
 - Where are you going to get the equipment?
 - Where are you going to get phone operators? (A lesson learned is that a ratio of 10:1 of operators to supervisor, who reports to the center manager.)
 - How are you going to get the message out to the public that you have a donations toll-free number(s) or Website?
- Consider having operators that are bi-lingual.
- TTY capability may be needed.

Visual 8: Take the Information

Update scripts as needed:

- Input caller information and offer, if appropriate
- Refer calls as necessary
- Direct operator questions to supervisor



Instructor
Note

Remind participants that not all offers will be needed or accepted.

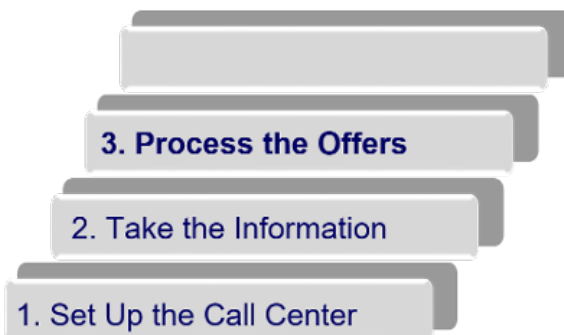
Explain the following best practices, modifying the information based on whether the participants plan on using a Website, call center, or both.



- Provide training to call center operators prior to an event.
 - During a disaster operation is not the best time for ‘just in time’ or ‘on the job’ training.
 - Have scripts for the operators to use when answering the calls. The script should include instructions on how to refuse an offer politely or re-route an offer.
 - Brief operators before their shift. This keeps operators up to date on what is happening with the disaster.
 - Have reference sheets for operators to use when answering questions.
- Will an established organization/agency set up and manage the call center for you?
- Not all offers will be processed.
- Reasons for refusing offers:
 - Not needed now or ever.
 - Too many restrictions from donor on offer.
 - Legal restrictions.

Visual 9: Process the Offers

- Prioritize offers based on need
- Allocate top-priority offers for immediate processing
- Decline unneeded offers
- Process all offers within 24 hours (preferably sooner!)



Instructor
Note

Ask, “What are some of the designations of the goods and offers that are processed in a disaster?”

Give real-life examples to participants for each of the four categories mentioned below, role playing the donor and the member of the VDCT.

Emphasize that donors should be told if their offer is not needed.



- IMPORTANT NOTE: This step is done by the VDCT based on the needs of disaster or emergency survivors.
- For instance, donors may offer cash. The VDCT may determine that the most pressing need is for deposits for apartment rents.
- Correct categories for processing the offers are as follows:
 - Match (between survivor need and donation)
 - No Match—Refused
 - No Match—Referred
 - No Match—Maintain for Future (within the current disaster OR a future disaster)

Visual 10: Close Down the Call Center

- Distribute news release or announce on Website
- Ensure all offers have been addressed
- Ensure all donors and staff are thanked

4. Close Down the Call Center

3. Process the Offers

2. Take the Information

1. Set Up the Call Center



- Instead of just closing the center abruptly, first cut back the hours/days of operations.
- Release an announcement about the “scaled back” hours to the Media.
- Put a message about the phone bank hours on the voice mail system.
- Reduce the number of operators and/or their scheduled hours, as needed.

Visual 11: Automated Information Management

- Improves coordination and management of donations
- Sorts offers of goods, cash, or services; searches for useful offers; and creates reports
- Provides a central information clearinghouse
- Maintains a list of specific needs
- Ensures all offers are handled



Explain the types of technologies available to the phone operators and the benefits of having backups for each of these systems (phone bank, inventory, volunteer management, Website).

Instructor **Discuss** real-life examples to reiterate points.
Note

There are several types of technologies available:



1. Web-Based Technology—Internet
2. Networked computers
3. Stand-Alone Technology—Single, non-network computer
4. Paper-Based Technology—Form template matches computer template

There is a need for redundant systems in many situations because of power failure, computer system down time, etc.

Visual 12: Summary

1. Describe what technologies can be used to accept and track offers.
2. Establish procedures for matching offers to the needs identified.
3. Identify information management system(s) to help match offered resources to identified needs.



Instructor
Note

Summarize the unit for the participants with a few key points.

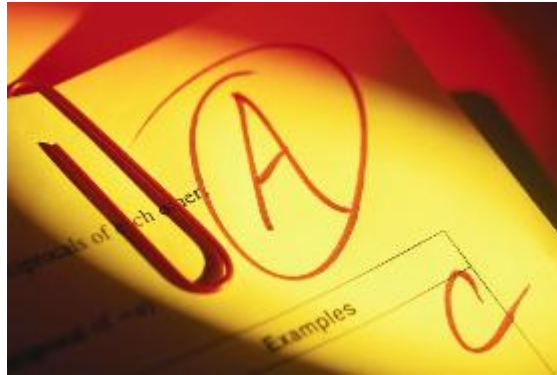
State: In this unit, we have had a chance to understand how a phone bank or call center operates in a disaster.

Ask for questions from the participants. If there are none, then state: In this unit, we explored in more detail the systems available to manage the influx of goods and services created in response to a disaster.



In Unit 8, we are going to review the work we've done over the course on your plan/annex for volunteer and donations management in a disaster.

Visual 13: Post-Course Assessment



Instructor
Note

Give instructions for the assessment, as written in the SM below.

If you have time, you may want to review the course and ask if they have any questions before the assessment.



- Before we review annexes in the next unit, we are going to take the post-course assessment.
- I will give you the assessment and a blank answer sheet.
- As with the pre-course assessment, please write your answers on the answer sheet and turn both documents in at the front of the room when you are done.

Unit 8: Local Plans

Unit 8: Local Plans

Estimated Time: 1.5 hours

Introduction

In this unit, we will discuss some planning terminology and considerations. Finally, you'll use a review tool to evaluate your local jurisdiction's Volunteer and Donations Management Annex, part of your local Emergency Operations Plan (EOP).

Objectives

At the conclusion of this unit, you will be able to:

1. Describe the planning considerations for annex development.
2. Determine who needs to be involved in annex development.
3. Explain the components of an annex to the local Emergency Operations Plan (EOP).
4. Evaluate and compare annexes for key principles and strategies.

Scope

- Planning Terminology and Considerations
- Evaluating Local Annexes: An Activity

References

- National Response Framework, National Disaster Recovery Framework, Lessons Learned Information Sharing Website.

Before Teaching This Unit • Ensure everyone has brought his or her copy of the Local Annex to class today. Point out that they have been reviewing these annexes all through the course. • Ensure you have enough copies of the other Local Annexes that you want to use for comparison today. Methodology • Interactive discussion and small group activity.

Time Plan	
Suggested below are anticipated times for each section in this unit:	
Unit Objectives	2 minutes
Planning Terminology and Considerations	25 minutes
Evaluating Local Annexes: An Activity	60 minutes
Unit Summary	3 minutes
TOTAL UNIT	90 minutes

Visual 1: Local Plans



Introduce the unit.

Instructor
Note

Visual 2: Objectives

1. Describe the planning considerations for annex development.
2. Determine who needs to be involved in annex development.
3. Explain the components of an annex to the local Emergency Operations Plan (EOP).
4. Evaluate and compare annexes for key principles and strategies.



Review objectives with the participants.

Instructor
Note

Visual 3: Planning Terminology and Considerations



Ensure everyone understands that Standard Operating Procedures (SOPs) and appendices are documents with more specific tactical information than what is generally described in an annex.

Instructor Note *Mention* <https://www.hsd1.org/c/lis-in-the-hsd1/> has a few plans from local jurisdictions.

Visual 4: Planning Considerations

- Why is an annex needed, who will develop it, and why is it important to get a team involved?
- What voluntary organizations should be involved in the process?
- Have lessons learned from previous exercises or operations been addressed?



Ask and *discuss* the questions on the visual.

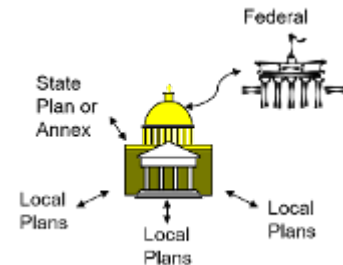
Instructor
Note



- No matter what title is used for the document itself, your jurisdiction needs to develop a written strategy for volunteer and donations management in a disaster.
- Since volunteer and donations is a complicated function, it requires a comprehensive plan of action.
- The annex, if done well, will serve as the blueprint for an effective volunteer/donations operation.
- Ideally, a joint government–voluntary organization team should be involved from the start in writing the annex. This approach will lead to a better sense of ownership and will be more sustainable and effective.
- FEMA’s Learning Resource Center (LRC) at the Emergency Management Institute (EMI) maintains a repository of after-action reports for volunteer and donations management. Contact the [LRC](https://www.usfa.fema.gov/data/library/) (<https://www.usfa.fema.gov/data/library/>) for additional information.
- <https://www.hsd1.org/c/lis-in-the-hsd1/> is also a good resource for information useful in planning.
- Call and talk with other Local Volunteer and Donations Coordinators to get feedback on whether your plan will work as well as it would appear to on paper and discuss it with your State Volunteer and Donations Coordinator.

Visual 5: Planning Considerations (Continued)

- How will your annex interface with State, regional, and other local annexes?
- Are the assumptions sound and understandable?
- Is there commitment regarding roles and responsibilities?



Instructor
Note

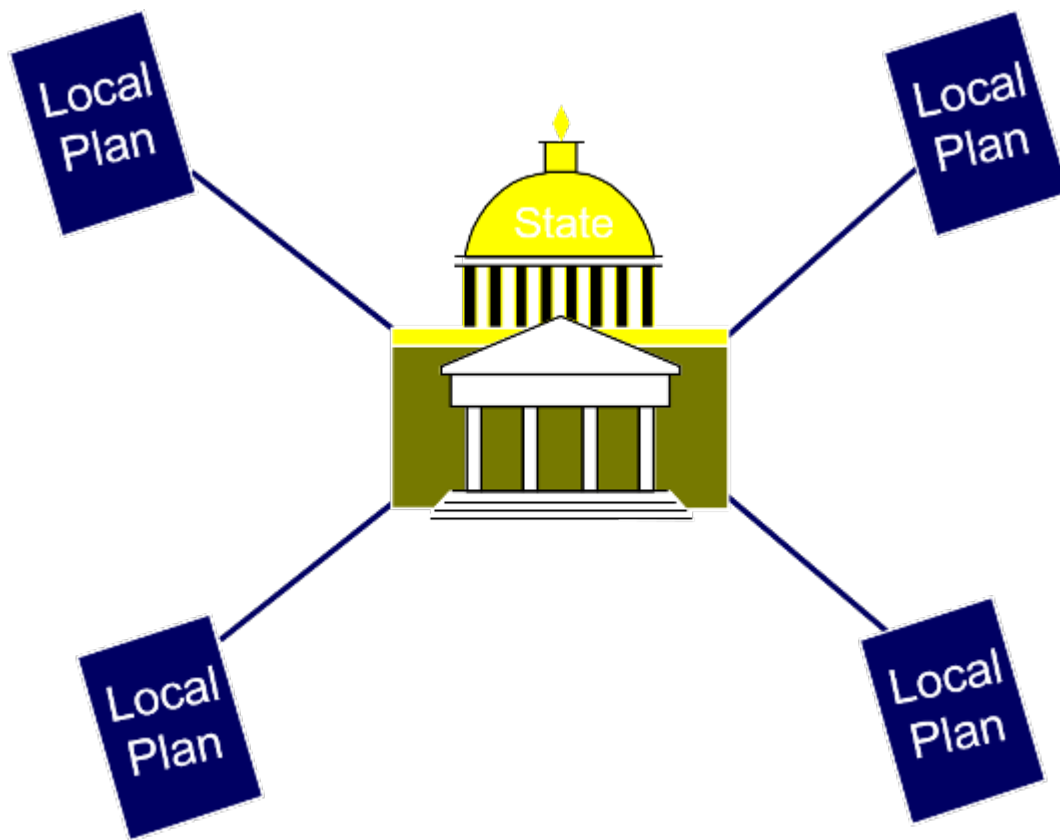
Ask, “Should there be appropriate linkages to the National Response Framework support annex, State Volunteer and Donations plans, and other local plans?”



- In the National Capital Region, for example, the District of Columbia, Maryland, and Virginia each have their annexes for volunteer and donations management, but there is also a regional annex developed by the Washington Council of Governments of which the three States are members. The specific local annexes should be in sync with the regional annex for volunteer and donations management.
- Does the annex spell out mutual aid support for neighboring jurisdictions?
- Are the assumptions sound and clear? Are they confused with facts?
 - An underlying assumption is important to an annex because it spells out some basic underlying factors which serve to anticipate certain activities. For example, a good assumption is that in a disaster, unsolicited donated goods and volunteer services will come into the area.
- Also, unsolicited donations and volunteer services could severely affect the local jurisdiction and local recovery efforts if not well managed.
- It is important that there is a good understanding of the level of commitment an organization will have when it is listed in the roles and responsibilities section. When the disaster occurs, it should be clear that

each supporting organization or agency will respond as it has committed to in the annex. Exercising the plan with all stakeholders will help clarify responsibilities.

Visual 6: State and Local Coordination

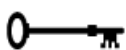


Instructor
Note

Ask, “How does a local plan possibly include linkages to other local annexes? In what ways?”

Ensure that participants’ answers include each of the following:

- Consider including liaisons to other affected counties in the volunteer/donations coordination center.
- Monitor distribution sites in counties that may need to be refilled with useful donated goods from local collection centers.
- Roles and responsibilities for mutual aid.



There may be a need to include linkages to county/local volunteer/ donations annexes for readers to gain a broader picture of what role the county may play and how the local jurisdictions will support the county.

Visual 7: Structural Components of an Annex

An example of a format for an Annex: Primary agency: _____ Supporting agencies:

- I. Introduction/Purpose/Scope
- II. Policies
- III. Situation/Assumptions
- IV. Concept of Operations



Point out that we have been discussing the annex all the way through the course and that they should ask if they have any questions about these structural components.

Instructor
Note

Visual 8: Structural Components of an Annex

An example of a format for an Annex: Primary agency: _____ Supporting agencies:

-
- V. Responsibilities
 - VI. Resource Requirements
 - VII. References
 - VIII. Terms and Definitions

Visual 9: Potential Pitfalls

- *What are some potential pitfalls in developing and maintaining a Volunteer and Donations Management Annex?*
- *How can we overcome them?*



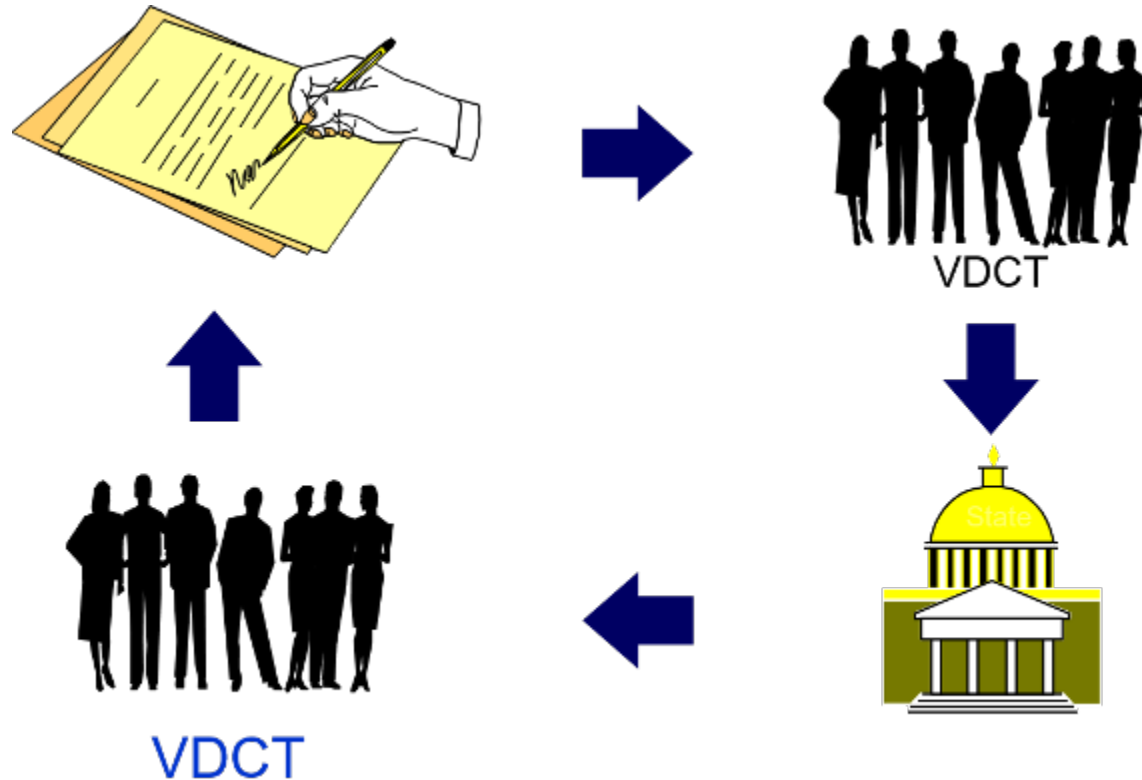
Lead a discussion about the questions on the visual and **explore** answers that will work in the local jurisdiction.

Instructor
Note



- The first pitfall we all see is an inadequate time to develop a plan.
 - This may be true because the priority given to the project is lower than it should be.
- Lack of funding and/or staff support.
 - By both government and voluntary organizations involved in the planning process.
- Local jurisdiction thinks that the State will take care of all donations/volunteer management issues.
- Challenges of agreement on roles and responsibilities of stakeholders.
 - How soon are they going to activate and assume responsibility for their role?
 - What assets are they going to bring to the table?

Visual 10: Approval Cycle



- It is critical the content of the annex be as current and complete as possible as it may not be sent through the approval process very often.
- Everyone has worked together to get the plan in writing.
- Work through your chain of command to go to the Local Emergency Director, to other local groups, and on to the county commissioner (or other local official) for his/her approval, as needed.
- After that official approves, it is routed to the VDCT.
 - This cycle may be repeated several times before the elected official will sign. Usually your Local Emergency Director will have a good idea of what the official will sign.
- Don't be afraid to put innovative ideas in your plan, as long as they make sense.
- Remember, this is a living document. There will be changes in the future.

Visual 11: So Your Annex Is Finished. What's Next?

- What training schedule is there for stakeholders?
- What is the exercise schedule for the annex?
- When will the annex be revised?




Ask, “Why is exercising/training for your plan important?”

Instructor
Note



- Important points:
 - Is it functionally possible to do? - Will the plan work?
 - Do all the stakeholders know that they are included in the plan and their responsibilities?
 - To expose gaps in plans. (Either you will expose gaps in your plan from your exercises or they will be exposed during a disaster operation.)
 - The repetition in exercises creates ingrained responses.
 - Promotes familiarity within all stakeholders.


Visual 12: Comparing and Contrasting Local Annexes



Activity

Comparing and Contrasting Local Annexes

- Individually (15 minutes)
 - Review the annex using the Checklist and Comparison Summary Tool.
- Group discussion (15 minutes)
 - Capture planning shortfalls and planning strengths on the easel.
- Report Out (10 minutes per group)



Instructor Note

Prepare the participants for an activity.

At tabletops, group participants according to their local jurisdiction.


Refer participants to the copies of various local plans that were handed out earlier in the week. Give instructions:

Directions:

The instructor will separate you into groups.



- Working in your small group, analyze your local plan. Then, using information from class, compare your plan with other plans to assess how to improve your own.
- Appendices A and B are the Checklist and Comparison Summary Tool to use in the initial individual review.
- Compare what you have learned from the analysis. List the key points from the comparisons that you would like to include into your plan. Capture on the easel chart.
- Discuss and capture on easel chart: “Where do we go from here?” What are the next steps the participants should do after leaving the class?
- Each group will report on its findings.



Instructor Note

Remind participants to provide only positive feedback. All criticism should remain constructive. This is not to be used to point out flaws in plans or to ridicule the developers, but to capture best practices and lessons learned.

Circulate among the groups to assist the participants. All instructors circulate among the groups throughout the entire period.

Provide encouragement on their talking points.

If groups complete their plan review early, encourage them to consider next steps: exercising their plan, stakeholder involvement, training their plan, etc.

Visual 13: Summary

1. Describe the planning considerations for annex development.
2. Determine who needs to be involved in annex development.
3. Explain the components of an annex to the local Emergency Operations Plan (EOP).
4. Evaluate and compare annexes for key principles and strategies.



Summarize the unit and the class for the participants with a few key points.

Encourage them to keep sharing and learning.

LOCAL ANNEX REVIEW TOOL

ANNEX CHECKLIST AND ANALYSIS:

Annex for the Local Jurisdiction of _____

Annex was last revised on _____

Checklist Overview of annex – check that standard components are in place:

- ☐ Purpose
- ☐ Situation
- ☐ Assumptions
- ☐ Concept of operation
- ☐ Assessment of roles and responsibilities
- ☐ Direction and control
- ☐ Administration and logistics
- ☐ Annex development
- ☐ Appendices and attachments
 - ☐ * SOPs
 - ☐ * Forms
 - ☐ * Contact lists
 - ☐ * Organizational charts

(Note: some documents are referenced only)

Analysis:

Identify and analyze key concepts and roles. Provide short concise analysis for each question.

Who is the lead agency?

Who are the support agencies?

Are the State and Regional VOADs featured as prominent players? How?

To what extent are the Voluntary Organizations identified and involved in the annex?

Are other local agencies involved in the annex? How?

Are media relations and public information functions addressed? How effectively? Are there sample press releases?

Is there a policy for working with social media?

Are facilities (collection centers, distribution centers, phone banks, etc.) identified and a process for acquiring them explained?

Are transport, trucking, and access control points addressed adequately in the annex?

Does the annex identify an information management system with support agencies/staff?

Is the concept of operations for planning for spontaneous volunteers adequate? How? Are volunteer reception/coordination centers mentioned?

What is the policy on cash donations?

Are the VDCT members identified and the role of the VDCT clearly explained?

How are needs for donations identified?

What is the policy on distributing unsolicited and undesignated goods to voluntary organizations? Which voluntary organizations are included?

Does the annex address how to support donations operations in other localities, in order to prevent the collection of unsolicited goods?

COMPARISON SUMMARY TOOL Appendix B

STRENGTHS	GAPS
<u>LOCAL ANNEX A:</u>	<u>LOCAL ANNEX A:</u>
<u>LOCAL ANNEX B:</u>	<u>LOCAL ANNEX B:</u>

STRENGTHS	GAPS