

[JURISDICTION] VOLUNTEER MANAGEMENT PLAN



VOLUNTEER MANAGEMENT

[Insert
Jurisdiction
Logo]

Workshop Manual

[Date]

This Workshop Manual provides participants with background information and discussion items to be used during the workshop. This Workshop Manual is intended to be used together with [Jurisdiction] Volunteer Management Plan. All workshop participants may view the Workshop Manual.

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How to use this template

This document is a template to assist Emergency Management staff in facilitating a Discussion-Based Workshop (Workshop) to familiarize their jurisdiction's agencies with their local government Volunteer Management Plan (Volunteer Plan). To help achieve the objectives involved in a coordinated Emergency Operations Center (EOC) volunteer management response, a Workshop can be used to validate and confirm the various roles and responsibilities defined in the Volunteer Plan. Notes taken during the Workshop can provide recommendations of updates to the plan and of future planning efforts.

To coordinate a Workshop, a jurisdiction should:

- Identify the stakeholders (agencies with a role or responsibility) in the Volunteer Plan
- For volunteer management, invitations should be considered for representatives from:
 - Social Services
 - Human Resources
 - American Red Cross
 - Nongovernmental organizations and faith-based organizations (including those that support a local Emergency Volunteer Center)
- Establish a good date for the Workshop and coordinate stakeholder invitations
- Revise the Workshop Template materials with jurisdiction specific information
- Provide, at minimum, a Workshop facilitator and scribe (for discussion notes)

Upon completion of the Workshop, a jurisdiction should:

- Develop an After Action Report/Workshop Summary Report that captures observations made during the workshop and identifies recommendations for future action and follow up
 - When possible, identify a timeline for addressing each recommendation
- Revise the Volunteer Plan based upon the Workshop discussions and After Action Report/Summary Workshop Report
- Exercise the plan through a Tabletop Exercise, Functional Exercise or Full-Scale Exercise
- Adopt the Volunteer Plan per the jurisdiction's protocols

The **blue** font in this Workshop Manual Template represents either instructional language providing guidance to the Manual developer, or blanks for where tailored information should be entered. Words or phrases in black font target information that may be left unmodified; however, any sections, phrases or words in this template can be revised as needed by the jurisdiction.

Administrative Handling Instructions

1. The title of this document is the *[Jurisdiction] Volunteer Management Plan Workshop Manual*.
2. This document should be safeguarded, handled, transmitted, and stored in accordance with appropriate security directives. **Note: This Instruction should be tailored to fit the requirements of the jurisdiction.**
3. For more information on this workshop, please use the following points of contact:

[Agency Name]
[Name of Contact]
[Title/Position]
[Street Address]
[City, CA, Zip Code]
[XXX-XXX-XXXX]
[Email Address]

[Agency Name]
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Acronyms

Use this section to define any additional acronyms used in the manual. Below is a list of examples.

Cal OES	California Governor's Office of Emergency Services
EOC	Emergency Operations Center
EOP	Emergency Operations Plan
EVC	Emergency Volunteer Center
FEMA	Federal Emergency Management Agency
HAZUS.....	Hazards U.S. (modeling software used to project damage from a given event)
M	moment magnitude
MM.....	Modified Mercalli
MOU.....	Memorandum of Understanding
NGO	non-governmental organization
NIMS.....	National Incident Management System
NRF	National Response Framework
Plan	[Jurisdiction] Volunteer Management
RCPGP	Regional Catastrophic Preparedness Grant Program
REOC	Regional Emergency Operations Center
SEMS.....	Standardized Emergency Management System
SUV	spontaneous unaffiliated volunteers
UASI.....	Urban Areas Security Initiative
Volunteer Plan.....	Volunteer Management Plan
Workshop.....	Discussion-Based Workshop

Workshop Agenda – [Enter Date(s) of Workshop]

Note: The times in the schedule below are included as an example. Start times and the length of discussion for each Module can be adjusted to fit the needs of the jurisdiction

9:30 a.m. Registration

10:00 a.m. Introduction

- Introductions
- Housekeeping/Logistics
- Workshop Overview

10:15 a.m. Module 1: Overview of the [Jurisdiction] Volunteer Management Plan

- Plan Overview
- Scenario
- Volunteer Management Assumptions

11:00 a.m. Module 2: Objectives 1 and 2

- Objective 1: Roles and Responsibilities
- Objective 2: Coordination and Communication

11:45 a.m. Working Lunch

Note: Having a “working lunch” is optional.

12:15 a.m. Module 3: Objectives 3 to 5

- Objective 3: Operations
- Objective 4: Public Information
- Objective 5: Information Management Systems

1:15 p.m. Module 4: Review and Findings

- Reviewed Concepts
- Strengths
- Identified Gaps or Areas for Improvement
- Next Steps

1:45 p.m. Participant Feedback

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Introduction

Workshop Purpose

The Bay Area Urban Areas Security Initiative (UASI) has implemented Regional Catastrophic Preparedness Grant Program (RCPGP) funds to develop plans in the following functional areas: Mass Fatality, Debris Removal, Mass Care and Sheltering, Mass Transportation/Evacuation, Interim Housing, Volunteer Management, Donations Management and Logistics. For each functional area a Regional Plan has been developed, as well as Operational Area plans for the 12 Bay Area UASI region counties and local government plans for two core cities (jurisdictions include Alameda, Contra Costa, Marin, Monterey, Napa, San Benito, San Francisco, San Mateo, Santa Clara, Santa Cruz, Solano, and Sonoma counties and the cities of Oakland and San Jose).

This workshop serves to conduct a systematic review of the [Jurisdiction] Volunteer Management Plan (Plan).

The workshop has three (3) purposes:

1. To familiarize workshop participants with critical elements discussed in the Plan
2. To review and/or evaluate critical elements and concepts presented in the Plan
3. To identify gaps and open issues for Plan revisions and future planning efforts

Workshop Scope

Note: the following scope is here as an example and can be edited by the jurisdiction to reduce or expand the scope of the workshop.

The scope of this workshop includes an evaluation of the assumptions, roles and responsibilities, coordination and communication, and elements of the operations described in the Plan. The workshop will be based on moment magnitude (**M**) 7.9 earthquake on the northern segment of the San Andreas fault. The workshop will not unfold chronologically; rather, it will examine key operational concepts and build from them to satisfy Workshop Objectives.

Workshop Objectives

The objectives of this workshop are to accomplish the following through participant inputs and discussion:

1. Evaluate the roles and responsibilities identified in the Plan and verify that the list is accurate and inclusive of all agencies relevant to volunteer management.
2. Evaluate that the methods described for coordination and communication among local, State, and Federal government agencies and with non-governmental organizations (NGOs) are accurate and consistent with the Standardized Emergency Management System.

3. Evaluate that the operations section of the Plan is effective at accurately describing all the critical issues relevant to coordinating volunteer resources.
4. Evaluate that the methods and mechanisms identified in the Plan for the dissemination of public information is appropriate for coordinating volunteer resources.
5. Evaluate that the information management mechanisms noted in the Plan for the collection and distribution of volunteer management related data are appropriate.

Workshop Process and Structure

This workshop will be an interactive, facilitated discussion, organized by Modules, and aimed at evaluating key elements of the Plan. The workshop modules will not be presented chronologically to mirror the scenario event; rather, they will support objectives that were formulated to verify accuracy and consistency of the Plan and the operational elements necessary to carry out volunteer management operations in the Jurisdiction.

[Insert a description of how the workshop will be facilitated. If you plan to use break-out sessions and/or facilitators for different tables, describe that here. Example text follows].

Participants will be grouped according to Emergency Operations Center (EOC) Sections (the section in which they are or would most likely be assigned to) and will engage in a facilitated discussion about critical elements of the plan. After these smaller group discussions, participants will engage in a moderated plenary discussion in which a spokesperson from each group will present a synopsis of the group's observations/discoveries based on the scenario.

OR

The workshop discussion will occur as a plenary session. A facilitator will guide the group in a discussion about critical elements of the plan.

[The structure of the workshop can be changed based on how the facilitation team determines it will be best to achieve the objectives for the workshop. The structure below is one example].

The workshop structure is designed to support a systematic review of the Plan by the participants, who are familiar with Volunteer Management issues, as they analyze the Plan and provide recommended revisions.

- **Module 1:** Overview of the [Jurisdiction] Volunteer Management Plan
- **Module 2:** Objectives 1 and 2 (Roles and Responsibilities, Coordination and Communication)
- **Module 3:** Objectives 3, 4 and 5 (Operations, Public Information, Information Management Systems)
- **Module 4:** Review and Findings

Participants will be introduced to Objectives and Discussion Points that support those objectives. They will be asked to respond to facilitated questions and provide comments on Plan content when issues arise. The workshop will conclude with a summary of reviewed concepts, strengths, gaps and areas for improvement, and next steps.

Workshop Guidelines

The following guidelines apply during the workshop: **Note: these guidelines can be modified by the jurisdiction. For example, if a jurisdiction wants to evaluate the assumptions derived from the HAZUS analysis, they can do so.**

- The primary goal of the workshop forum is to ensure that the coordination, resource-requesting and decision-making processes are accurately described.
- Emphasis for this workshop is on identifying potential inaccuracies or gaps and resolving them using facilitated discussion among stakeholders.
- Issue identification is not as valuable as suggestions and recommended actions that could improve response and preparedness efforts. Developing solutions should be the focus of participants.
- The ability to evaluate the content of the Plan depends on thoughtful input from participants.
- Participants are encouraged to participate based on their knowledge of existing plans, capabilities, and insights as well as from their review of the Plan.
- Decisions are not precedent-setting and may not reflect the final position of individual participants' organization on a given issue. The workshop is an opportunity to present and discuss multiple options and possible solutions.
- During the response, cooperation and support from other responders and agencies is assumed.
- The scenario, objectives, and assumptions serve as the basis for discussion.
- The workshop is designed to evaluate elements in the Plan, not to evaluate the scenario or the Hazards U.S. (HAZUS) software estimates used to develop some of the assumptions.

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Module 1: Overview of the [Jurisdiction] Volunteer Management Plan

Plan Overview

The [Jurisdiction] Volunteer Management Plan addresses the overall concepts for the coordination of spontaneous unaffiliated volunteers (SUVs) and Emergency Volunteer Centers (EVCs), as well as communication and coordination with affiliated volunteer programs for the [Jurisdiction]. This jurisdictional Volunteer Management Plan is consistent with the Regional Volunteer Management Plan; California's Standardized Emergency Management System (SEMS) and the National Incident Management System (NIMS).

The term *spontaneous volunteer*, refers to an individual who comes forward following a disaster to assist a governmental agency or non-governmental organization with disaster-related activities during the response or recovery phase without pay or other consideration. Spontaneous volunteers may also be referred to as unaffiliated volunteers, spontaneous unaffiliated volunteers, and convergent volunteers.

The term *affiliated volunteer*, refers to one who is affiliated with either a governmental agency or NGO and who has been trained for a specific role or function in disaster relief, response or recovery during the preparedness phase. For the purposes of this plan, the term 'affiliated' will refer only to pre-trained volunteers who are associated with a specific group prior to the event. 'Affiliated' will not be attributed to SUVs who are processed and then assigned during an incident to a receiving organization.

The purpose of the Plan is to:

- Establish a framework by which the [Jurisdiction] can coordinate spontaneous and affiliated volunteer resources for community-wide response, relief, and recovery following a catastrophic earthquake or other disaster.

The objectives of the Plan are to:

- Provide an all-hazards framework for volunteer coordination that is scalable to the size and scope of the disaster, including a catastrophic event
- Augment, as a supporting annex or plan, the [Jurisdiction] Emergency Operations Plan (EOP)
- Enhance the availability of volunteer resources to the Operational Area, City and the community-at-large for disaster response, relief and recovery
- Enhance the means by which both spontaneous unaffiliated and affiliated volunteers can contribute their time and talents during the response and recovery efforts of a disaster
- Strengthen communication and coordination among the [Jurisdiction] and local jurisdictions regarding volunteer coordination following a disaster

- Strengthen communication and coordination with the California Governor’s Office of Emergency Management (Cal OES) Regional Emergency Operations Center (REOC) regarding volunteer coordination following a disaster
- Identify functions, roles and responsibilities within the [Jurisdiction] that support coordination of spontaneous volunteers and government affiliated volunteer programs
- Address coordination with non-governmental organizations for the most effective community-wide approach to disaster volunteer coordination
- Ensure that the implementation of the Volunteer Management Plan is in accordance with the principles and practices described in the National Response Framework (NRF), the State of California Emergency Plan and local emergency plans.

Note: In this section below provide a description for how the Plan is structured. The description here is an example and may not represent exactly how your jurisdiction’s plan is organized.

The Plan comprises primary text and eleven (11) attachments. The main body describes the situation; general and specific planning assumptions; operational priorities, objectives and tasks; preparedness for coordination of disaster volunteer operations; and separate concepts of operations for spontaneous volunteers and EVCs, and for affiliated volunteer programs.

The attachments are as follows:

- **Attachment A:** RCGCP Plan Scenario
- **Attachment B:** EOC Position Checklists
- **Attachment C:** EOC Data Collection and Report Forms
- **Attachment D:** EOC Scripted Public Messaging
- **Attachment E:** EVC Checklists
- **Attachment F:** EVC Forms
- **Attachment G:** EVC Memorandum of Understanding (MOU) Template
- **Attachment H:** Affiliated Volunteer Programs in [Jurisdiction]
- **Attachment I:** Review of Legal Issues Relating to the Use of Volunteers by Public Entities
- **Attachment J:** Legal FAQ
- **Attachment K:** Glossary/Acronyms

The sections below provide additional information about the RCPGP, the specific impacts associated with the scenario event, and the assumptions made about the volunteer management response based on the scenario.

Scenario

These Plans are scenario-driven, function-specific documents that describe emergency management operations in the aftermath of a catastrophic earthquake in the Bay Area. While developed in response to a catastrophic earthquake scenario, the Plan is intended to be applicable to all hazards and scalable to the size and scope of an event.

The scenario event is an M 7.9 earthquake on the northern segment of the San Andreas fault. The basis for the scenario is a HAZUS analysis¹ performed by the Earthquake Engineering Research Institute, with support from the U.S. Geological Survey and Cal OES, beginning in 2005 and modified in 2009 by URS Corporation for the RCPGP.

Note: the scenario impacts listed below are from the Regional Plan. Your jurisdiction may wish to use the local impacts for your jurisdiction in lieu of these. Keep in mind, that awareness of the impacts of neighboring jurisdictions is useful in understanding the full context of the scenario event.

Some of the initial impacts, to the region, of the earthquake scenario projected by the HAZUS analysis are:

- 300,000 people seeking shelter
- 500,000 households without electricity
- 1.8 million households without potable water
- 7,000 fatalities
- 50 million tons of debris
- More than 1 million people requiring transportation assistance because of hazardous conditions or dislocation

The characteristics of the scenario event and its impacts on the region are as follows:

1. The earthquake occurs in January on a weekday at 1400 hours Pacific Standard Time.
2. A foreshock precedes the main shock by 20 to 25 seconds. There is no other warning.
3. The main shock lasts 45 to 60 seconds.
4. The epicenter is just outside the entrance to the San Francisco Bay, west of the Golden Gate Bridge.
5. The earthquake ruptures approximately 300 miles of the northern segment of the San Andreas fault, from the San Juan Bautista area in the south to Cape Mendocino in the north.
6. Shaking is felt in Oregon to the north, Los Angeles to the south, and Nevada to the east.

¹ HAZUS is a loss estimation software program that was developed by the National Institute of Building Sciences (NIBS) for FEMA. The version used for this analysis (HAZUS MR3) was developed by NIBS in 2003.

7. The estimated magnitude is **M 7.9** with Modified Mercalli (MM) intensity of VIII (severe shaking/moderate to heavy damage) to IX (violent shaking/heavy damage) in widespread areas of the most severely affected counties. Pockets in the affected counties experience instrument intensity of MM X (extreme shaking/very heavy damage), particularly areas immediately adjacent to the fault and areas where liquefaction is likely to occur.
8. Ground shaking and damage occur in 19 California counties, from Monterey County in the south to Humboldt County in the north and into the San Joaquin Valley to the east.
9. Damage is catastrophic in the areas that experience shaking intensities of MM IX and X and in the areas with high or very high levels of susceptibility for liquefaction, which are the areas adjacent to the fault in Marin, San Francisco, San Mateo, Santa Clara, Santa Cruz, and Sonoma counties.
10. Counties along the fault outside the Bay Area, such as Mendocino, may sustain damage and require response.
11. Central Valley counties such as Sacramento and San Joaquin may be affected immediately by evacuations and other response actions.
12. The rest of California and the Nation are affected significantly by the need to respond; the deaths, injuries, and relocations of Bay Area residents; economic disruption; and media attention.
13. Threats and hazards resulting from shaking, surface fault rupture, and liquefaction include:
 - Structural and nonstructural damage to buildings, including widespread collapse of buildings
 - Structural and nonstructural damage to infrastructure
 - Widespread fires
 - Subsidence and loss of soil-bearing capacity, particularly in areas of liquefaction
 - Displacement along the San Andreas fault
 - Widespread landslides
 - Hazardous materials spills and incidents
 - Dam/levee failure resulting in flooding
 - Civil disorder
14. Threats and hazards resulting from the main shock are aggravated or recur during aftershocks, which continue for months after the main shock.
15. The earthquake does not generate a tsunami or seiche, despite its magnitude.

Volunteer Management Assumptions

Note: in this section please enter the assumptions identified in your Jurisdiction's Volunteer Management Plan. The assumptions are used to enhance the scenario description and provide a basis for the discussion.

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Module 2: Objectives 1 and 2

Objective 1: Roles and Responsibilities

Objective 1 is to evaluate the roles and responsibilities identified in the Plan and verify that the list is accurate and includes all agencies relevant to volunteer management.

Discussion Point 1: Review list of roles and responsibilities found in the plan and comment as to inclusiveness and clarity.

Facilitation Questions

1. Are the roles and responsibilities of the Jurisdiction described in the Plan accurately?
2. Are the roles and responsibilities of NGOs described in the Plan accurately?
3. Should any organizations be identified that were not included in the Plan?

Objective 2: Coordination and Communication

Objective 2 is to evaluate that the methods described for coordination and communication among local, State, and Federal government agencies and with NGOs are accurate and consistent with SEMS.

Discussion Point 1: Address the potential challenges relative to Communication and Coordination between government agencies and voluntary organizations.

Facilitation Questions

1. Does the Plan clearly identify how communication and coordination will be done between government agencies and voluntary organizations?
2. Are there additional communication and coordination issues that should be addressed in the Plan?

Module 3: Objectives 3 to 5

Objective 3: Operations

Objective 3 is to evaluate that the operations section of the Plan is effective at accurately describing all the critical issues relevant to coordinating volunteer resources.

Discussion Point 1: Review and evaluate the operational priorities identified in the Plan.

Facilitation Questions

1. Does the Plan clearly define the priorities associated with volunteer management following a catastrophic event?
2. What other priorities should be considered for inclusion?
3. Are the objectives and tasks for each time frame realistic?

Discussion Point 2: Discuss the exact mechanisms for supporting the local EVCs and meeting local resource needs at the EVC level.

Facilitation Questions

1. Is it clear how requests to support the EVCs are made?
2. Is Coastal Region's method for managing resource requests clearly explained in the plan?

Objective 4: Public Information

Objective 4 is to evaluate that the methods and mechanisms identified in the Plan for the dissemination of public information is appropriate for coordinating volunteer resources.

Discussion Point 1: Discuss the Volunteer Management role in the Joint Information System/Joint Information Center Process and how timely information will be processed and disseminated to the public.

Facilitation Questions

1. Is it clear who will be coordinating and disseminating public information relative to the need for volunteers in the region?

Facilitation Questions

2. Is it clear how the Volunteer Coordinator will be involved in the release of public information?
3. Is it clear how to share information among jurisdictions within the region?

Objective 5: Information Management Systems

Objective 5 is to evaluate that the information management mechanisms noted in the Plan for the collection and distribution of volunteer management related data are appropriate.

Discussion Point 1: Discuss how data will be gathered and shared within the region, from EVCs to the REOC.

Facilitation Questions

1. Does the Plan identify the type of data that will need to be tracked related to Volunteer Management activities?
2. Is there additional Volunteer Management related information which needs to be documented that the Plan does not address?
3. Is it clear how the Coastal Region will manage and distribute data on volunteer deployment throughout the region?

Module 4: Review and Findings

1: Reviewed Concepts

Review the critical concepts that were evaluated during the workshop discussion.

2: Strengths

Identify any strengths that were discovered during the workshop.

3: Identified Gaps or Areas for Improvement

Review gaps or areas for improvement in the Plan that were identified during the workshop discussion.

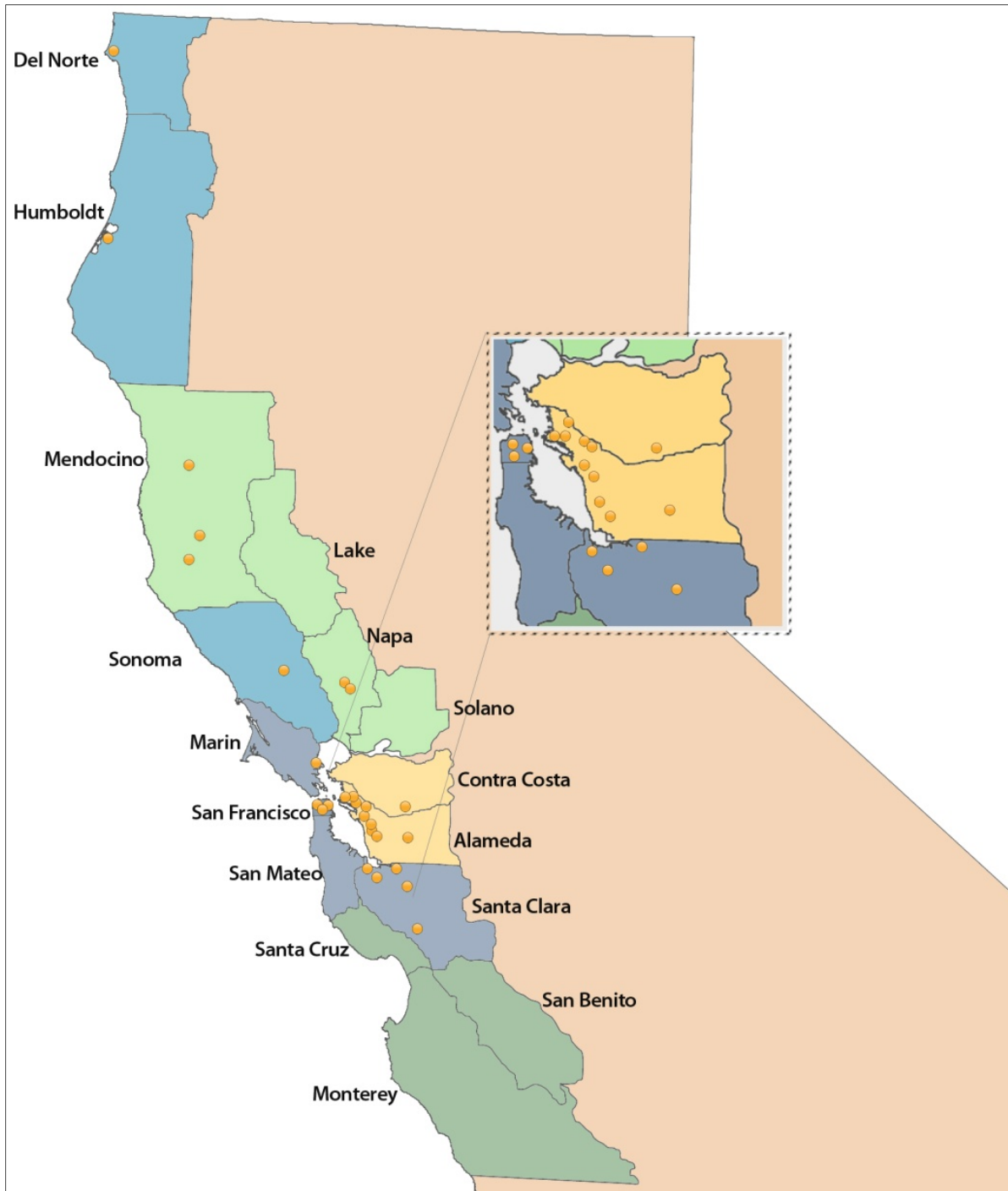
4: Next Steps

Note: following the workshop, the Jurisdiction should consider next steps for inclusion in the manual. Next steps may include: the development of an After Action Report/Workshop Summary Report, an After Action Meeting, additional workshops or working groups, and revisions to the Plan. Use this section to detail these next steps.

Appendix A: Maps

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Map 1. EVC facilities in Coastal Region
(Regional Volunteer Management Plan Figure G-1)



Map 2. 211 service organization by county
 (from the Regional Catastrophic Earthquake Donations Management Plan)

