Managing the Surge | 2-1-1 Volunteer Surge Management Curriculum

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Curriculum

This training course was developed as a supplement to materials already in place to assist 2-1-1s in preparing for and responding to disasters. It was also developed in response to experiences and the inevitable need for strong, flexible and well-prepared 2-1-1s. Appendix A contains a list of available disaster preparedness tools specifically designed for I&R services. This training is recommended for 2-1-1 Centers who have a disaster business contingency plan written and in place.

The need for the training became apparent following the 2004/2005 hurricane seasons as the series of storms tested the 2-1-1s ability to respond in Florida, Mississippi, Louisiana and Texas. During those disasters, I&R professionals from unaffected areas were asked to assist 2-1-1 centers in affected areas with providing services to victims and families. These services were delivered with the best intentions, on-site, at remote sites and virtually through technological links. Feedback following those experiences indicated additional pre-disaster planning, training and tools were needed to better prepare for effective management of an influx of I&R professionals and volunteers to assist in caller and data management following a disaster. The professionals also recommend scenario based training for new and experienced I&R staff on a year-round basis.

Surveys conducted in the winter of 2007 revealed that the I&R professionals at disaster sites, as well as those who deployed from unaffected areas, were profoundly impacted by the work they performed. They wanted their work to be of highest quality possible and to have the greatest impact. United Way of America (UWA) and the Alliance of Information & Referral Systems (AIRS) recognize that 2-1-1s are now being considered a key social utility during disaster—THE place for FEMA, American Red Cross and other disaster serving agencies to refer victims for disaster resource information and referrals.

UWA and AIRS would like to recognize National Human Services Assembly for the IMPACT: A Fund for Change Through Volunteerism grant to develop the training curriculum and ensure the dissemination of the materials. It is also important to recognize that this is a collaborative project seeking and receiving strong leadership from the Federal Emergency Management Agency (FEMA), Covenant House Nineline, National Emergency Numbering Association (NENA – 9-1-1), and an impressive array of local, regional and statewide 2-1-1 and United Way professionals. It is their experiences and input that have filled the contents of this training curriculum.

SECTION 2
INTRODUCTION TO THE COURSE

Objectives

To introduce terminology for understanding the context of the training

To review the layout of the training

Narrative

The training curriculum is designed in sections that build upon information provided in previous sections. Each will contain:

- **Objectives**
- **Discussion questions**
- **Narrative**
- **Review/Summary**
- **Case Studies**
- **More things to consider**

Comments/stories from I&R professionals and volunteers relating their experiences in recent disasters will be interspersed throughout the curriculum.

The term "Volunteer"

For the purpose of this training manual the word "volunteer" will refer to those persons who are not permanent staff of a 2-1-1 managing the disaster I&R services. The word "volunteer" will include:

- Professional I&R/Resource personnel deployed from other 2-1-1 centers
- Pre-trained or pre-qualified persons, who through previous arrangements have been screened, trained or prepared to assist the 2-1-1 in a disaster
- Virtual I&R/Resource personnel assisting in answering disaster calls or updating disaster resources from an area via technological linkages
- Spontaneous volunteers the I&R deems as qualified to assist in a 2-1-1 setting

Note: If any of these groups are being paid or if the 2-1-1 is entering into a mutual aid agreement where reimbursement to a lending agency will be required, it is recommended that a term other than volunteer be used. Volunteer denotes donated services that are not reimbursable and could result in the 2-1-1 not being able to bill for the expenses related to the use of those professionals.

The term "2-1-1"

It must be said that the dialing number 2-1-1 is one of the most effective tools an I&R can use following a disaster. The ease of remembering a three-digit dialing number becomes a strong commodity. If an I&R is located in an area affected by a disaster and is not currently using 2-1-1 as their telephone dialing number, the disaster may become the catalyst for moving that area into the 2-1-1 dialing system. For the purpose of this training manual the term "2-1-1" will be used interchangeably with the term "I&R".

The term "disaster"

The word "disaster" and "incident" have been used interchangeably in the literature, in part because there are events that are caused by nature, some man-made and some that remain uncategorized. In this manual, the word "disaster" will be used and is defined as:

> An occurrence, either natural or manmade, that causes human suffering and creates human needs that victims cannot alleviate without assistance.[1] A disaster overwhelms the local communities' capabilities to respond and results in fatalities, human suffering and property loss.

[1] www.google.com/url?sa=X&start=11&oi=define&q=http://wps.prenhall.com/chet_langan_preparing_1/0,9681,1613226-content,00.html

A natural or manmade event that negatively affects life, property, livelihood or industry often resulting in permanent changes to human societies, ecosystems and environment. Disasters manifest as hazards exacerbating vulnerable conditions and exceeding individuals' and communities' means to survive and thrive.[2]

The word "emergency" is used to describe a sudden unforeseen crisis (usually involving disaster) that requires immediate action. In this training manual emergency is generally considered short-term while a disaster is considered a longer-term issue.

Similar to any other defined social service there is a language of acronyms. Appendix B contains the definitions of those most commonly used acronyms.

The curriculum will cover a large array of disaster volunteer management and preparedness information. It does not intend to imply that ONE person in an organization should be responsible for carrying out all aspects of the training. Quite the opposite, the manual recognizes that in recent disasters 2-1-1s have tried to assign additional roles to persons already burdened by the disaster resulting in eventual burnout. It is intended to illustrate that careful planning in advance can ease those burdens and enhance a high quality 2-1-1 community response.

Review

The sections will contain written objectives, discussion questions, narrative, review and case studies when appropriate.

The word volunteer is used to describe all persons assisting a 2-1-1 that are not considered permanent staff.

The intention of the manual is to layout advance preparations that can support a 2-1-1's ability to manage a surge in the use of volunteers to effectively respond to a community disaster.

A disaster in an area where 2-1-1 is currently not operational may result in the dialing number 2-1-1 being activated to assist the I&R in their disaster response.

Appendix B can assist the participant in understanding acronyms and abbreviations used by disaster serving organizations.

[2] www.google.com /url?sa=X&start=3&oi=define&q=http://en.wikipedia.org/wiki/Disaster

SECTION 3
PREPARATION FOR 2-1-1 DISASTER VOLUNTEER MANAGERS

Objectives

Increased knowledge about disaster preparedness

Increased knowledge of the AIRS and UWA disaster tools

Discussion Questions

Does your 2-1-1 have a written disaster preparedness plan and/or a business contingency plan?

Does the organization's business contingency plan outline how the 2-1-1 could accommodate an increased need for an additional 10-50 personnel to answer calls and manage data?

Is the organization aware of the threshold where additional outside support would be needed and recognize the request for said support is appropriate business planning versus an inability to effectively function with existing staff?

Is your 2-1-1 accredited through AIRS?

Has your 2-1-1 implemented AIRS Standards 21-27 – known as the AIRS Disaster Standards?

Has your 2-1-1 populated the disaster taxonomy in the resource database?

Does your 2-1-1 have a plan or procedure to change the contingency plan should it become unworkable?

Do you have a personal/family disaster plan?

Narrative

Strong perception and awareness is necessary to promote effective disaster response by an organization. AIRS and UWA have a strong history of developing materials to assist organizations in preparing for disaster. The use of these materials has been demonstrated to mitigate the amount of chaos and confusion that can occur when a plan has not been developed and implemented.

A critical first step in preparation for managing volunteers is to ensure the organization has a business contingency plan in place. The plan should outline where and how the staff should report following the disaster, the role/s the organization has agreed to play in the community, what steps will be taken to transfer calls and manage the database if the building is damaged, how the organization will operate if the staff is directly affected by the disaster and not able to come to the worksite.

The AIRS Standards have clear expectations of the relationships, planning and preparations a 2-1-1 should have in place prior to a disaster. Use of the AIRS Standards, as well as other tools found in Appendix A are highly recommended. The template for a Disaster Preparedness Plan and a Business Contingency Plan can begin the process for thinking through your organization's structure and needs following a disaster. The AIRS Standards, a disaster preparedness/business contingency plan template can be found at the AIRS website in the AIRS ToolKit at www.airs.org

Many 2-1-1 organizations have developed strong collaborative plans with the local, state and regional emergency management offices. Knowing how the 2-1-1 fits in the community emergency management plan is also a key part of being prepared. All disasters are local and it is essential to know the agencies and the people that will be responsible locally for the disaster response and relief activities. The sample memorandums of understanding and mutual aid agreements located in Appendix C can assist in determining who potential community partners could be as well as how those partnerships can function. Sample Memorandums of Understanding and Mutual Aid Agreements can be found at the AIRS website www.airs.org and United Way 2-1-1s can find examples of plans at United Way of America's online services http://online.unitedway.org (password protected).

Section 4 reviews the Incident Command System outlining the structural roles and responsibilities emergency management organizations use to understand who is managing specific aspects of a business.

Section 5 is designed to assist in planning how a surge in personnel following a disaster can be managed. You can use the tools in that section to help think through key components of your organization's business plan.

If the 2-1-1 is a part of a larger organization, it will be critical to have those persons responsible for the organization's risk and quality management plan take into consideration the needs of the 2-1-1 following a disaster. Use of the AIRS and UWA tools can prompt additional discussions and more realistic plans for the 2-1-1.

An effective 2-1-1 organization understands key social service delivery systems such as Medicaid, Medicare, Social Security, local financial assistance, child care and elder care. The disaster management system also has a structure that needs to be understood by the 2-1-1 in order to be most effective in linking victims to resources. There are several good training curriculums available including the AIRS Disaster Preparedness Training that can assist you in understanding systems, acronyms, definitions, language and structure of local, state and federal emergency management. You can find a list of those resources is Appendix A.

Last and first, each person in the organization should have a plan for how their family will respond to a disaster. An individual/family plan mitigates confusion in the immediate aftermath of a disaster and can provide an essential peace of mind which enables an employee to be available to work. American Red Cross has an excellent training available on-line (www.redcross.org) and in local communities.

If you work in an organization that has all the written plans in place, the final question is …have you practiced and tested the plan? This should be done at a minimum once a year. When hired every new employee should be made aware of the plan and their roles/responsibilities in carrying out the plan.

Review

Develop or review a written disaster preparedness plan for the organization.

Become knowledgeable of the local and state disaster management organization.

The AIRS Disaster Standards contain an outline for effective preparedness for a disaster.

Provide Disaster Training for the organization staff.

Provide training for all staff to prepare an individual/family disaster plan.

Case Study

The head of local emergency management contacts you and wants to know who will be your emergency liaison in case of a community-wide disaster. They would like the name and the home/cell telephone numbers to publish for use by other key disaster relief agencies. They have heard through their state and federal emergency management contacts that 2-1-1 will take the non-emergency disaster information calls in the immediate aftermath of a disaster. They want to write you into their plan, but they need a copy of your disaster preparedness plan showing how you will staff and interact with the local emergency management agencies.

Do you know what an emergency liaison is?

Do you know how to determine who the most effective staff person would be to perform that role?

Do you have a plan you can provide them?

For more information about developing a written plan refer to the AIRS Disaster Preparedness Training at www.airs.org. or at United Way On-line http://online.unitedway.org (password protected). They have templates to assist 2-1-1 in disaster preparedness and business contingency planning.

More things to think about

The first step in all of this is making sure the organization has a written plan. It is important to be aware that even if it does not, the organization may still be expected to respond. 2-1-1s are a part of a community's social service structure. If the community is aware the organization has a mission stating they will provide I&R services, there is an implication that the organization will continue to do so following a disaster.

There is an increased chance the 2-1-1 can be reimbursed for disaster I&R services if they are in a written community emergency management plan. It demonstrates the 2-1-1 is a key and necessary component of emergency management.

Objectives

Become familiar with federal terminology regarding the Incident Command System

Illustrate the 2-1-1 role in Incident Command System

Discussion Questions

How is the Department of Homeland Security involved in disasters?

Why would a 2-1-1 director need to know how the government will respond to a disaster?

Narrative

Following the terrorist attacks of September 11, 2001, the President signed a series of Homeland Security Presidential Directives (HSPDs) that were intended to develop a common approach to preparedness and response. One HSPD is of particular importance, HSPD-5.

HSPD-5, Management of Domestic Incidents, identifies steps for improved coordination in response to incidents. It requires the Department of Homeland Security to coordinate with other Federal departments and agencies and State, local and Tribal governments to establish a National Response Plan (NRP) and a National Incident Management System (NIMS).

NIMS provides a consistent framework for incident management at all jurisdictional levels, regardless of the size, cause or complexity of the incident. NIMS requires that Incident Command System (ICS) be institutionalized and used to manage all domestic incidents. Thus it is critical a 2-1-1 understand and, if possible, use the terminology and structure of the ICS. A recommended training to help understand the ICS system is FEMA ICS-100. It can be found on-line and is free of charge.[3]

The following is a description of an ICS system within a 2-1-1 developed by Burt Wallrich for the Orange County, CA 2-1-1.

Non-profit organizations are not mandated to use NIMS/SEMS. However, 2-1-1s can and should use a modified version of the ICS portion of NIMS to organize and manage its emergency operations.

ICS calls for an emergency management structure made up of an Emergency Manager and four sections: Operations, Planning, Logistics, and Finance.

Operations are responsible for the provision of service both on-site and off-site, as well as gathering and disseminating resource information.

Planning is responsible for developing a plan to carry-out the mission of the agency during the disaster. They monitor activities, identify problems and develop plans to address problems.

Logistics is responsible for procuring materials that operations need to implement and carry-out the plans to meet the mission.

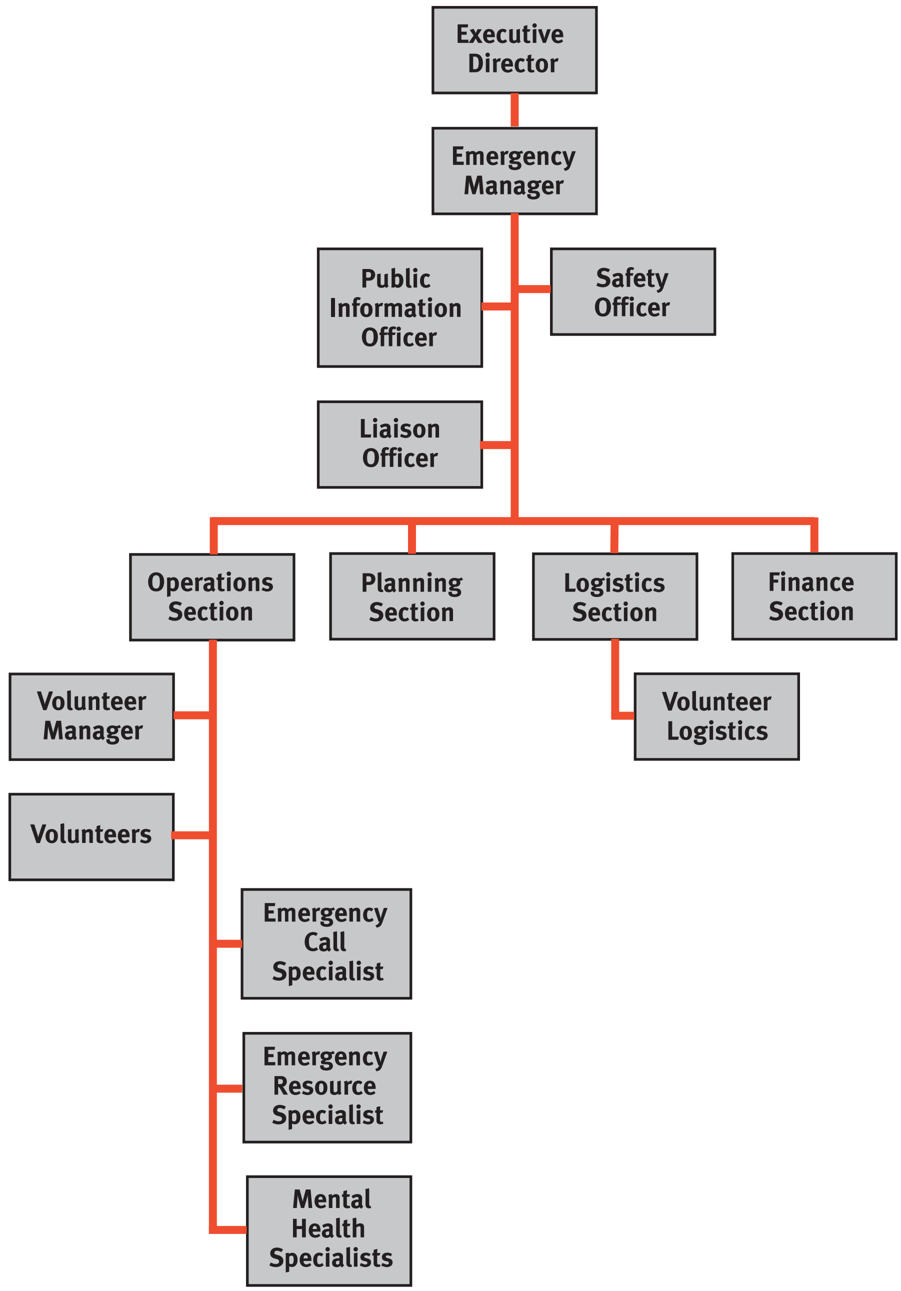
Finance is responsible for maintaining all financial records related to the disaster, as well as gathering cost estimates and damage estimates.

ICS provides a common terminology that can assist 2-1-1s in sharing with other disaster response and relief organizations thus facilitating communications during an emergency. It also gives us a terminology in common with the government agencies that work in a community following a major event. Finally, it serves as a checklist to make sure the basic functions needed to do effective work in the context of a fast-breaking situation are being considered. Every function should be carefully considered in every activation. However, the decision might be made that it is not necessary to staff a given function, or that one person can handle two or more functions in a particular activation.

[3] www.fema.gov

A full-scale version of the NIMS/ICS organization chart, adapted for a 2-1-1 agency, follows:

NIMS/ICS Organization Chart for 2-1-1



Volunteer Management functions primarily fall under the **Operations and Logistics Section.** The Operations Manager oversees the Volunteer Manager (assuming these functions are not performed by the same person). The volunteers themselves (after training) are included in the Emergency Call Specialist and Emergency Resource Specialist populations, and supervised by the appropriate supervisors for those functions. HOWEVER, special oversight of their work may be assigned to the Volunteer Manager.

The Volunteer Manager interacts with the Logistics Section as necessary to ensure that volunteers have their housing, transportation and other needs met. The Volunteer Manager interacts with the Finance Section to ensure that any insurance and/or liability issues are attended to and that records of the work of the volunteers are maintained. These special responsibilities for volunteers may be assigned to the Volunteer Manager but they retain their ICS character as Logistics and Finance functions.

2-1-1 Disaster Preparedness Manuals recommend against the Executive Director serving as the Emergency Manager or the Operations Manager. A large-scale disaster will tax all the talents of an Executive Director and their energies need to be focused on the sustainability of their organization. Another management staff person should be assigned to manage the emergency and the operations within the organization. There is more about this subject in the AIRS Disaster Preparedness Manual listed in Appendix A.

Review

The President mandated the Incident Command System (ICS) be used to manage all domestic incidents.

The ICS is institutionalized at all levels of government.

Non-profit organizations are not required to use the ICS, but it is to their advantage to do so. It creates a common language for interacting with government entities during a disaster incident.

Volunteer Management functions would fall primarily under the Operations Manager Section of the ICS.

Case Study

A chemical spill in Nevada has resulted in a 100 mile evacuation area. The 2-1-1 is located 200 miles from the disaster site. The Nevada Department of Emergency Resources calls and requests a meeting with the Emergency Manager at the 2-1-1. Who is the most likely person to perform that role?

The Executive Director

Chief Operating Officer

Director of 2-1-1

Director of Finance

Either the Chief Operating Officer or the Director of 2-1-1 depending on how the organization is structured. Most ICS training manuals recommend against the Executive Director acting as Emergency Manager because their skills will be needed to manage the on-going business of the organization. The Director of Finance will most likely be focused on tracking disaster related costs.

SECTION 5
ANALYSIS OF THE 2-1-1 NEED FOR VOLUNTEER SUPPORT FOLLOWING A DISASTER

Objectives

Identify where in the planning process the participant's organization is at present

Identify what the next steps in developing a comprehensive plan

Visualize how the participant's organization could prepare for a volunteer surge of up to 50 persons

Discussion Questions

Has your organization tested its Disaster Response Plan? Does it include accommodating a surge in call volume and the need for additional staff to respond to those calls?

Has the organization considered a disaster that would have an impact requiring relief and recovery services for a three to six month period?

Narrative

Imagine the most common disaster likely to occur where your organization is located. Think about tornadoes, floods, wildfires, hurricanes…the kinds that result in loss of homes and businesses. Think about the number of persons that could call a 2-1-1 if the number was distributed by emergency management personnel and the media. Would the 2-1-1 be able to manage the surge of calls and the ever changing myriad of disaster resources? Now imagine the type of disaster that could affect your entire region. What would your organization do to assist your partners in the region?

This section is designed to help you visualize, prepare and implement such a response.

Following September 11th, 2001, the Governor of Connecticut determined 2-1-1 was the way to assist citizens in obtaining information regarding services for victims of the tragedy and their families. The Governor agreed to deploy 50 government health and human service workers, as well as communications equipment to support the effort.

The 2-1-1 in Monroe, LA became the staging site for responding to victims in the aftermath of Hurricane Katrina. The 2-1-1 call volume required close to 50 volunteers a day to effectively manage calls and resources. The call volume was sustained at a high level for months and is still operating at over 100% more than that handled by the agency's pre-disaster three person staff.

A surge requiring additional personnel to answer calls and manage resources can occur in any community. An unexpected advertisement of the 2-1-1 promoting a specific in-demand service can spike call volume in seconds. Normally the spike will last no longer than 72 hours and call volume returns to normal. It is important to look at how the 2-1-1 prepares for those types of spikes. There may be resources your organization already uses that help in planning.

This section will focus on the planning process; later sections will describe recruitment, training, and the nuts and bolts of disaster volunteer management. This section is laid out as a series of questions, with responses to the questions culled from the disaster experiences of 2-1-1s and a third column for participants to note their thoughts, ideas and responses.

A part of the planning process not articulated by existing and experienced 2-1-1s is determining the threshold at which the organization can no longer manage the calls without additional assistance. Deciding the threshold ahead of time will prepare the organization for making the call to request assistance. This decision as a part of a pre-determined plan has two benefits:

It can, in part, alleviate some of the feelings of inadequacy; and

Increase the feeling of managing the disaster rather than it managing the organization.

Consider the following situations:

When the call volume has been sustained for more than three days and staff is handling more than a hundred calls each per day?

When the abandonment rate reaches 10%, 25% or 50% for more than 24 hours?

When the staff begin showing the effects of stress (anger, giddiness, fatigue, depression)?

Consider these additional questions for preparing the organization.

PLANNING QUESTION	SUGGESTIONS	YOUR IDEAS
Describe the most likely disaster for your geographic area that would require a surge of 10-50 volunteers to effectively manage an increase in call volume and resource data.	Florida, Texas, Mississippi and Louisiana might consider using a hurricane or flood scenario. Iowa, Nebraska, Kansas and Oklahoma might want to consider tornadoes. Northern states may want to consider ice storms.	
How would you decide how many volunteers are needed to manage the incident?	The 2-1-1 Toolkit has a matrix for determining # of staff for call volumes. The 2-1-1 could be taking calls 24/7 for 1 week to 6 months depending on the severity of the incident.	
Where would your operation stage a response requiring an additional 50 persons? Does it have the desks and furniture to seat 50 additional persons?	Connecticut 2-1-1 commandeered a space in another section of the floor the 2-1-1 was utilizing. Monroe, LA 2-1-1 moved to a different building. A local used office supplier could loan or donate office furniture.	
Do you have computers, telephones, electrical capabilities and Information Technology Specialists to connect the equipment and maintain its operability?	In Houston following the 1994 floods, Gifts-In-Kind International donated computers, fax machines and cell phones through their relationships. In Oklahoma City, IBM made donations of computer and software. UWA provided technical support.	
Is there another site locally that already uses similar technology and/or equipment that could partner with you to manage the calls and data?	Many communities have call centers operating nearby that could be used as staging sites. A first thought should be other I&R services or Crisis Centers. Remember telephony is a fragile system and it can be assumed that it will be impacted by a disaster.	
Could data and/or calls be managed virtually by another 2-1-1 off-site or even in another state or region?	Texas and Virginia 2-1-1 has an integrated telephone and database system that allows calls and data to be managed at any 2-1-1 site within the state. One of the 2-1-1 centers in Florida has a Mutual Aid Agreement with a 2-1-1 site in New Jersey that uses the same resource software. Calls can be transferred using the telephone software.	

PLANNING QUESTION	SUGGESTIONS	YOUR IDEAS
Where would you recruit 10-50 I&R and Resource Specialists?	The Governor of Connecticut loaned 50 health and human service employees to CT 2-1-1 following September 11th. 2-1-1s throughout the United States loaned call and resource specialists to Monroe, LA. TX 2-1-1 centers are tasked with year-round training of volunteers/agencies to ensure disaster sites can act as soon as possible to avoid impacting all the other 2-1-1 sites across the state. Pre-training and pre-qualifying local volunteers in the community can be done. United Way based 2-1-1s have experimented with using campaign and loaned executives to manage surge.	
How would they be screened, interviewed, trained and supervised? Who would be responsible for these duties?	This has been problematic at most incidents to date. The following sections in this manual will address ways to effectively manage this.	
How is crisis debriefing currently being utilized in your 2-1-1? How would you implement a regular crisis debriefing in response to this incident?	Less than one-third of the I&R/Resource Specialists deployed in Katrina/Rita report having received crisis incident debriefing. This is essential in the effective management of a 2-1-1 during an incident. There are Crisis Incident Debriefing Specialists deployed during disasters, but there are also professionals with this training in many communities. Your organization might consider contacting and using them on a quarterly basis pre-disaster so they are familiar with your services post-disaster.	
If you use volunteers from out of the area, where will they be housed? Who will provide meals and transportation? Who will be responsible for coordinating and managing these arrangements?	The local Volunteer Center may be able to help set-up staging sites to welcome and orient out of town volunteers, locate and assign housing and transportation and find volunteers to provide meals.	
How will the 2-1-1 pay for the expanded services and the related costs?	Developing pre-disaster agreements with the local and state emergency management agencies can improve the chances of receiving reimbursement for disaster related services. TX had the Department of Emergency Management pay for expansion services in advance to ensure services would be available. CA has open contracts with local jurisdictions to address expanded services. Donations and volunteers can also help to manage costs.	

PLANNING QUESTION	SUGGESTIONS	YOUR IDEAS
How will you dismantle this service once the incident is over or the call volume declines?	A plan for moving from relief services to recovery and eventually back to standard operations should be incorporated into the disaster preparedness plan of the organization. Tracking the call volume and setting dates can assist in assuring this step takes place. Thresholds rather than specific timelines should guide these transitions.	
How will you manage the 2-1-1 if the surge call volume becomes the normal call volume for the 2-1-1?	Monroe, LA 2-1-1 is struggling with this phenomena. The current call volume is still over 100% higher than pre-Katrina call volumes. The community has recognized the importance of 2-1-1 and the organization will need to use the success of the disaster response to demonstrate the need for on-going funding for the community's future needs.	
Who will follow-up with the volunteers after they return home or back to their previous employment?	A scheduled quarterly follow-up should occur with volunteers who assist the 2-1-1. This is a process of debriefing as well as recognition for their time and service. This can be done by conference call or web-based blogs.	
How will you recognize or reward the volunteers?	A thank you and memento from the area where they served is significant. Volunteers in Oklahoma City received a mounted piece of the building with a small plaque of thanks. Volunteers in Monroe received cars and clocks.	
How will you recognize or reward the staff?	During an incident staff generally go above and beyond. It is essential that staff receive similar recognition to the volunteers for their work.	

Review

Many 2-1-1s experience call volume surges outside their normal business experiences. Consider how these calls are managed and see if there are techniques that would apply to a long-term sustained surge.

The 2-1-1 should plan for a minimum of 50 volunteers. A need for more or less than 50 can then be more easily managed based on the formula for 50. A need for less than 50 will also be easier to manage.

It is critical to determine a time and manner for disbanding the surge operation and resuming standard operations.

SECTION 6
BEFORE RECRUITMENT

Objectives
To determine what tools need to be in place prior to recruiting volunteers

Discussion Questions
Does your organization have clear employee policies and procedures that would be applicable to record, screen and place volunteers?

Does your organization have job descriptions for I&R Specialists, Resource Specialists, I&R Services managers/supervisors that could be amended for volunteer use?

In reviewing your current organizational structure, what positions do you anticipate would be able to handle the logistics and management of a surge of 50 volunteers?

What are the liability limitations in your state for the use of volunteers? Do these extend to the use of professional volunteers?

How will the organization prepare staff in advance to work effectively with volunteers?

Narrative
Section 5 described ways to anticipate and pre-plan for the number of volunteers anticipated following an incident. Section 6 assists in preparing tools and processes for management of volunteers prior to a disaster. First the organization should clarify where and how it will utilize volunteers. It must also identify a screening process and a threshold for when a request for volunteers is issued. Ideas for thresholds were discussed in the previous section.

Determine the job positions that are most likely to be filled by volunteers and develop job descriptions. It will simplify the process if an organization's current job description format and wording can be used. If the organization requires a separate job description for volunteers, a sample job descriptions are located in Appendix D and can be customized to meet the organization's requirements. How the position will fit into the organizational reporting structure should be clearly defined with the job description.

Use the organization's current applicant review and screening process. This process should have clearly written instructions on how the organization screens for qualified individuals. Determine if the organization is going to check references, run a background check or both. Have a process for expediting these tasks for volunteers utilized in a disaster response. Have a formalized interview process; many organizations use behavioral interviewing. If the organization is going to use out of town or virtual volunteers, the interview questions could be sent to the volunteer to be completed then returned to the organization. The responses would be reviewed and considered part of the volunteer employment record.

Develop a written orientation to the organization which includes:

- Mission
- Role in disasters/incidents
- History of organization
- Normal services to the community
- Incident services to the community

Develop a written orientation to the 2-1-1:

- Disaster mission

Define the role the 2-1-1 is playing in this disaster beyond normal I&R functions (missing person's registry, in-kind gift matching, rumor control, etc.):

- To whom they report each day
- Where to record time worked each day

A sample orientation checklist can be found in Appendix D.

Develop an on-site training with a checklist for the volunteer and trainer to sign upon completion of each section. This is a critical risk management piece and should include the following:

- Orientation to the building—accessing the building and any space restrictions, including a map
- Orientation and training on equipment—telephone and computer
- Introduction to supervisors and other staff and volunteers
- Emergency protocol training
- Update on the incident and changes to the resource information
- Additional roles the 2-1-1 are providing (GIK, missing persons matching, etc)

A sample training checklist can be found in Appendix D.

Clarify who will supervise and evaluate the volunteers. This is another area where an organization's performance appraisal tools may be applicable. A sample volunteer performance appraisal can be found in Appendix D. A discussion on performance appraisals can be found in Section 8. Remember to train staff to the tools developed for this process.

Utilizing virtual volunteers may require adapted tools for screening, interviewing, supervising and evaluating services. Because the volunteer works from their home or their sponsoring organization, virtual volunteers can save the disaster impacted organization the cost of travel, transportation, meals and lodging. The need for clear instructions and training about their role and responsibilities, receiving and using information in a rapidly changing I&R environment, supervision and evaluation of services rendered all need to be considered before utilizing virtual volunteers. More of these details will be reviewed in Section 8 and 9. If the volunteers are recruited through a Mutual Aid Agreement, the details of who will be utilized, their qualifications and methods of supervision should be laid out in the agreement. A sample Mutual Aid Agreement is located in Appendix C.

Prepare the organization staff for the utilization of volunteers during a disaster if the organization does not normally use volunteers. Some potential issues are[4]:

- Training and supervision of volunteers take a lot of time
- Technically competent people do not volunteer
- Volunteers threaten paid staff by competing with them
- Volunteers lower professional standards
- Volunteers become territorial and/or attempt to take over
- Insurance rate will increase
- Using volunteers interferes with the ability to negotiate for additional funding or new staff positions

There are benefits associated with using volunteers:

- Trained volunteers can assist the organization in managing a disaster
- Volunteer training can bring a fresh perspective to training materials that may need updating
- Training staff to recognize the use of volunteers is temporary and their use helps meet the mission and there is a prescribed plan for disbanding the surge volunteers
- Volunteers bring a new energy to the operation
- Volunteers allow staff to take breaks and time off from the disaster activities

[4] FEMA. www.fema.gov Developing and Managing Volunteers. Page 2.5

As you review these concerns and benefits, consider how the organization will address them actively through education and strong, well thought-out planning.

An organization and volunteer's immunity to liability generally extend to those areas in which they can demonstrate they were adequately trained and in turn, followed the training. When an organization does not adequately prepare a volunteer for work performed and someone is harmed, the liability skips over the volunteer and becomes the organizations. The Federal Volunteer Act of 1997, covers the work of a volunteer, but not necessarily injuries at the workplace. The organization will need to contact their insurance carrier and legal counsel to determine if additional coverage is required for volunteers. Some organizations require the volunteer sign a waiver releasing the organization from responsibility for injury to the volunteer while they are serving on the organization's behalf.

Case Study

A 2-1-1 in Idaho has been approached by a local civic group offering to volunteer to answer calls at the center during a disaster. What is the most important consideration before accepting their assistance?

- A clearly written plan for the use of volunteers
- Volunteer job descriptions
- Volunteer supervisor to manage the training
- Developing a schedule

A plan for how the organization will use volunteers should be in place before volunteers are recruited.

Review

A written plan for where and how volunteers will be utilized is the first step in planning.

Have volunteer tools prepared before a disaster occurs. The 2-1-1 will not have time to focus on developing volunteer tools once a disaster has hit, so have them prepared before a disaster occurs.

Thoughtful preparedness will not eliminate all volunteer management needs during a disaster, but it will provide structure in the chaos.

Written orientation, training and checklists prepared in advance will remind staff of areas of risk management that could be overlooked during a disaster.

Review state laws regarding volunteer liability and check to make sure your organization's insurance covers volunteers on premises as well as worker's compensation.

Objectives

To locate and recruit qualified volunteers

To develop a recruitment process that results in qualified and trained volunteers prior to a disaster

Discussion Questions

Does the organization have a Memorandum of Understanding or Mutual Aid Agreement with another 2-1-1? If so, when was it reviewed, updated and/or practiced by both organizations?

Does the community have specialized I&Rs or crisis hotlines that use similar techniques for responding to calls (telephone equipment, resource database, customer service skills, client tracking)?

Is there staff within the larger organization that could perform I&R duties if their normal responsibilities were placed on hold because of a disaster (United Way campaign staff or loaned executives)?

Is there a Volunteer Center in the community that could act as a recruitment liaison for the 2-1-1?

Narrative

This section will assist in recruiting volunteers to perform duties that may or may not be needed at an unforeseen date, time and place. This can be challenging, but can be done.

If the 2-1-1 is currently using volunteers to handle calls in the I&R then the process will be similar but more intense because of the need to bring on a larger number. The 2-1-1 could expand their recruitment, train and pre-qualify enough volunteers to manage a significantly high surge in call volume. The volunteers could be used year-round and only require set number of hours per month to maintain a level of competence in the I&R skills.

The 2-1-1 can enter into Mutual Aid Agreements (MAA) with regional 2-1-1 centers. A Mutual Aid Agreement would mean each organization agrees to send staff or virtually use staff to support the center affected by an incident. This ensures trained and qualified professional volunteers to assist in the response. An in-depth discussion on virtual agreements can be found in Session 10.

MAA generally include details such as:

Outlining estimated numbers of staff which could be deployed to assist the other organization

Compensation arrangements including benefits, travel, lodging, meals

Supervision of deployed staff while at the affected site or while performing virtual duties for the affected site

When and how the MAA is activated

Sample MOU and MAAs can be found in Appendix C.

The organization can develop a local cadre of volunteers through the Volunteer Center or agreements with AmeriCorps, local corporations, or for-profit call centers. An application for VISTA could include hiring a person to coordinate and implement the disaster volunteer recruitment process resulting in permanent relationships with corporations that can be tapped for future disasters. Some recruitment sources are:

- Colleges and universities
- Churches
- Professional Organizations (NASW)
- Social service agencies
- Local government agencies—in California, the agencies are mandated to partner with disaster responding organizations
- Alumni associations
- Civic Groups
- Service Clubs
- Trade associations
- Existing volunteer teams, such as CERT or Citizen Corps

Spend time considering the types of volunteers the organization will need and how those volunteers could be reached, as well as how contact will be maintained with those volunteers.

AIRS and UWA has developed a Disaster Response Team (DRT) using I&R Specialists from 2-1-1s experienced in disasters. These professionals have been pre-trained and pre-screened to serve in leadership roles or as I&R/Resource Specialists. They can also assist in managing a request to the field for assistance similar to what occurred following Hurricanes Katrina and Rita. The DRT chairs would send out the request and/or find a volunteer to assist in the screening and qualifying of those responding to the request. The requesting organization will be expected to reimburse the volunteers for their travel, transportation, meals and lodging. Long-term use of a volunteer may also result in covering additional costs for the volunteer such as salary and benefit reimbursement to the lending organization. AIRS and UWA contact information can be found at: www.airs.org or www.unitedway.org

Recruit for ABILITY not AVAILABILITY. The need for disaster volunteers generally requires getting people in place doing their jobs as quickly as possible. Recruiting someone with the wrong skill set costs the organization time and energy and results in a disaster within a disaster. 2-1-1s who have responded to disasters unanimously agree that unqualified volunteers should not be used regardless of their availability. It is easier to say "no" during recruitment than to wait until the volunteer has arrived on site and an investment has been made in travel, training and supervision. Recruit to the determined needs, the job descriptions matching those needs and the skill sets/experience outlined in the job description. Some attributes of strong DISASTER 2-1-1 professionals are:

Flexibility

Sense of humor

Grace under pressure

Compassion

Knowledge of telephone and computer software/hardware

Able to work in chaotic work environments

Willing to work long hours for low/no pay

Follows instructions well

Experience

A list of recruitment ideas can be found in Appendix E.

Review

Recruit for ability not availability.

Utilizing non-professionals to perform I&R roles will require advance training and pre-qualification.

Establish a MAA with another 2-1-1, review and practice the plan annually.

Recruit volunteers that demonstrate the intangible attributes of flexibility, sense of humor and compassion as well as those with professional skills.

Things to Consider

Consider using retirees from your organization as volunteers.

Objectives

Develop additional skills in matching volunteers to appropriate positions

Develop an effective orientation & training for volunteers following an incident

Discussion Questions

What would you like to have known before you sat down the first day at an I&R and began answering calls or inputting data?

What prepared you to be effective at answering calls or managing data?

Have you ever volunteered somewhere with someone that should not have been allowed to volunteer? Equally, did you meet a volunteer that had the right energy and the right knowledge and really made a difference? What made one different from the other?

Narrative

The pre-recruitment preparation helped determine what positions volunteers might fill. Recruitment identified where some of those volunteers might be found. A strong orientation can ensure the volunteers are a good match for the organization before the investment of time and energy in training.

If a local volunteer has submitted an application, the organization must take the time to:

Review the application

Interview the volunteer

Ascertain their skill level as well as their availability and

Determine if the volunteer meets the needs of the agency

If an out-of-town volunteer has submitted an application, an interview can occur over the phone. In both scenarios, references should be checked and documented, background checks run (if possible) and credentials verified.

AIRS has agreed to expedite any requests to verify CIRS or CRS certifications. The AIRS Chief Operating Officer can authorize this process. Contact information for the COO can be located at www.airs.org. Many colleges allow employment verification of attendance via the web or telephone if the candidate has provided social security number and date of birth. These steps should be performed and documented. This is a critical step in risk management when using volunteers that should be performed and documented.

If the organization is using virtual volunteers, those volunteers should submit applications and their experience reviewed and approved by the supervisor who will be evaluating their performance. The loaning organization could provide a supervisor endorsed checklist of necessary skills, training and education in place of the screening processing. Some examples of strategies for managing virtual volunteers can be found in Session 10.

Orientation should take place before the volunteer arrives at the 2-1-1 center. NENA has developed an outstanding orientation document that prepares 911 volunteers for the conditions they may encounter when they enter into an area of a catastrophic incident. Ideas from their training are captured in the pre-deployment letter in Appendix D. This information, along with a brief description of the community could be provided to the out of town volunteer before they depart from their home. 2-1-1 volunteers indicated they would have liked to have known the following information prior to arrival:

Work attire

Average daily temperatures

A person's name and working telephone number if travel arrangements are changed

Who will pick them up at the airport and how will they know that person (a sign with the arriving volunteer's name)

Incident conditions

Emergency contact information the volunteer can leave with their family

How many hours a day they can expect to work

Where they will be staying (it came as a surprise to some volunteers they would be lodged in a local home)

A map of the community and where open businesses are located (drugstores, supermarkets, fast food, restaurants, laundromats, etc)

A gentle reminder to the volunteer that they are guests of the 2-1-1 and it would be in good taste to recognize and respect the staff experience and service during the disaster.[5]

Upon arrival at the staging site, the volunteer should sign-in and provide the organization with current emergency contact information. The staging site should be an area where orientation to the community and to the incident takes place. The volunteer gets an overview of the community's response to the incident and the role they will play at the 2-1-1. After completing the community and incident orientation, the volunteer will receive an orientation to the organization. At this time they will sign the agreement forms and any waivers the organization may be using. The volunteer should be provided with a nametag that has the organization's name on front and local emergency contact information on the back. This stage is one in which it would be appropriate to cull a volunteer who is not a good match for the 2-1-1 work.

Training

How much training takes place on-site is determined by the organization's decision about what type of volunteers they recruit. I&R professionals volunteering will need training on the telephone system, the computer software, an overview of the community's agencies and their involvement in the incident relief and recovery. A local supervisor should be easily available to them until they learn the local resources.

Non-I&R professionals should be pre-trained prior to the incident. If the volunteers have not been regularly updated at the 2-1-1 they will need a review of the 2-1-1, equipment and procedures. If this group has not been pre-trained, but has the necessary skill sets, AIRS provides on-line training that may be appropriate for preparing the volunteers (ABCs of I&R and Disaster Training for I&R and Resource Specialists). Go to www.airs.org for more information. This should be mandated for the volunteers to take prior to arriving for training. The volunteers will require a local supervisor to stay near them as they learn the telephones, computers and resources.

Virtual I&R Professionals—if the volunteers are operating from another 2-1-1 site with the same or similar resource database and a MAA is in place, it is assumed a recent cross-training occurred between the two (or more) organizations. If it did not, an on-line training would be required or an in-person trainer could be sent to the site of the virtual volunteers to get the process implemented. The process should include a review of the community resources, the nature of the incident and the agencies in place to provide relief and recovery. Daily updates can be provided by e-mail, on-line conferencing or telephone conferencing.

[5] 2007 2-1-1 Volunteer IMPACT survey responses related a number of experiences in which the host site felt their work was being belittled and unappreciated by the volunteers. A request for "grace under pressure" was echoed throughout the survey.

Training can occur daily as the shift leaving briefs the arriving shift. A daily review of key changes should occur and include the following:

Changes in resources

Changes in locations of crisis responders, shelters, mass feeding locations

New sites for FEMA and VOAD service providers

Call trends – types of callers and specific needs and unmet needs

Where to find the information in the database or changes in how to record those resources.

Similar de-briefing should take place daily with the virtual volunteers. This can be performed via conference call at the end of shift each day.

Orientation and training checklists can be found in Appendix D.

Review

Send applications to out-of-town volunteers with a letter orienting them to the local conditions and organizational expectation

Review and screen all applicants. Consider using an on-line behavioral interview tool to expedite the process.

If possible set-up a staging site for receiving and processing volunteers. This could be coordinated through the local Volunteer Center and serve multiple agencies. Orientation to the community and the disaster conditions could take place at the staging site and save time and resources on the part of the 2-1-1.

Daily training should take place during shift briefings and de-briefings.

Case Study

Three I&R professionals show up at the 2-1-1 call center. They have traveled from out of state to offer their help. They were not expected and have not submitted applications for the work.
The Operations Manager should first:

Ask them to go to the staging site, fill out an application and get their credentials processed.

Call their home 2-1-1 center and ascertain if they are qualified.

Graciously accept their offer and introduce them to the 2-1-1 manager to find a place for them to begin working.

The Operations Manager does not want to get involved in processing volunteers unless it is within their specific job description. All volunteers, regardless of experience, need to fill out applications and be processed through the established system. This reduces risk and ensures the organization is managing all volunteers equally.

SECTION 9
SUPERVISION AND PERFORMANCE APPRAISAL OF VOLUNTEERS

Objectives

Develop tools and processes for evaluating volunteers

Discussion Questions

How does the organization normally conduct performance appraisals?

Does the organization have a tool that could easily migrate for use with volunteers?

Does the organization have regular training available for supervisors in using performance appraisal tools?

Describe the culture of supervision within the 2-1-1 organization.

What are skills that would be required of a supervisor during a disaster that may not be called upon during standard operations?

Narrative

This is a step often overlooked in volunteer management. If the organization provides a job description, an orientation and training, in stands to reason it would want to ensure the volunteer was performing the services as requested and trained to perform. During a disaster there is generally more work than can be physically completed by the staff at hand. Therefore it is prudent to have easy-to-use performance appraisal forms that can provide the organization with the means to address high performers as well as substandard performers. If the organization has a performance appraisal process that would easily migrate over to the evaluation of volunteers, use it. If not, a performance appraisal checklist can be found in Appendix D.

The assigned supervisor should use the job description and the performance appraisal tool during training. This helps both the supervisor and the volunteer clearly understand what will be expected of them and how it will be measured. It also creates an opportunity for dialogue about what may be perceived as unrealistic expectations or unattainable objectives.

I&R professionals' surveyed following deployment to disaster sites indicated this was one of the most frustrating parts of their experience. They did not know what was expected, they were not always sure who their supervisor was and they felt abandoned by the organization during their shifts. Most did not get direct feedback about their performance other than "thank you's" and could not determine if they were being thanked for just being present or if they had accomplished meaningful work. This could be true at some organizations regardless of whether a disaster has occurred. Performance appraisals should occur on a regularly scheduled basis. Supervision is often the first task that is set aside during an emergency, but it is also the worst possible step to eliminate, as it manages the human resource risks of the organization.
A suggested schedule is below:

- Throughout day 1 provide verbal feedback
- End of Day 2; provide written feedback with acknowledgement of good performance and areas to increase skills, as well as a means to do so.
- End of Day 3, verbal review is provided by supervisor.
- End of service, if less than one week or end of Week 1 if volunteer is continuing for more than one week, written review.
- End of each week of service until service completed, a written review.
- An end of service provide a written appraisal and an exit interview.

A recommendation is that if the I&R professional is "on-loan" from another organization an arrangement should be made to provide the home 2-1-1 with a copy of a performance appraisal at the end of the volunteer service, especially if the deployed volunteer is being paid by their home 2-1-1.

It is critical to the well-being of staff and volunteers that they know and receive recognition for the challenging work they accomplish each day during a disaster (more about this topic is in Section 10).

Supervision extends past the time the volunteer leaves the site. Each volunteer should receive an exit interview and an opportunity to anonymously critique their experience. Each volunteer should receive a follow-up telephone call after returning home and depending on the severity of the disaster every week to two weeks for several months. Quarterly follow-up calls for up to a year after they return home is also advised.

Each volunteer should receive formal recognition for their work prior to leaving the site, if possible or within two weeks after their departure.

Virtual volunteers could receive daily e-mail or IM messages of thanks and their home supervisors should be receiving regular performance appraisals. More discussion on managing virtual volunteers can be found in Session 10.

A copy of performance appraisals should be kept in the volunteer's HR file. The DRT will request feedback on the performance of any professional they deployed to an incident site.

Ideas for disaster volunteer and staff recognition can be found in Appendix G.

Review

A structure for supervision should be clearly articulated in the written plan and staff trained accordingly.

Performance appraisals should be conducted on a regularly scheduled basis to let the volunteers know how their performance is impacting the organization and the community.

I&R professionals on loan to the organization should be aware a performance appraisal will be submitted to their home organization. The appraisal will be discussed with the loaned volunteer prior to sending a copy out.

Case Study

A supervisor received reports that a volunteer is becoming confrontational with victims calling into the 2-1-1. After speaking with the volunteer, you learn they have been told there are no more resources and they have not been trained on what to say to the callers. The volunteer is frustrated and feels helpless to assist the victims. What should the supervisors feedback include?

Acknowledgement of the frustration of unmet needs

A reprimand for mishandling calls

Dismissal of the volunteer

A review of the daily training and briefing process

The supervisor will want to acknowledge the frustration as well as the possibility of a gap in the daily training and preparation. One incident like this in a disaster situation is not uncommon, continued incidents of confrontational behavior may mean the volunteer will need to be reassigned.

SECTION 10
MANAGING THE VIRTUAL VOLUNTEER

Objectives

Learn ways to incorporate the use of virtual volunteers in a disaster response.

Discussion Questions

What agency would be a logical partner in an agreement to assist through virtual technology?

What attributes would be important to consider in developing those agreements?

At what point would your organization reach a threshold of the number of calls or resources that could be effectively managed? This should be considered whether you are the disaster affected organization or the support organization.

How will you prepare staff to manage work coming to them from another organization?

Narrative

Throughout the training materials there have been references to the use of virtual volunteers to help in managing costs. This can be a successful strategy when coupled with strong planning and training. The use of virtual volunteers can occur by entering into a Mutual Aid Agreement with another 2-1-1 or specialized I&R, or it can occur by using one or more individuals working from their homes or another remote site. The technological issues are becoming much easier to overcome. Some of the lesser known challenges cited by 2-1-1s who have assisted affected organizations virtually include trust between the parties, consistent standards of service delivery, supervision, managing problems, communication and de-briefing. Some of these areas are addressed in Section 7 under Mutual Aid Agreements. This section will review a number of issues and provide examples of tested and suggested ways to address those issues.

AO= Affected organization SO= Supporting organization

ISSUE	EXAMPLE	IDEAS
What is the call capacity of the SO? What will happen of the call surge surpasses the SO capacity?	In Texas, the 2-1-1 discovered the rollover organizations began to become overwhelmed. They have implemented a planning process for three of their sites to develop a volunteer surge contingency plan in which those sites will have pre-qualified volunteers trained to assist in a surge.	
Does the SO and the AO have similar job descriptions for I&R and Resource Specialists?	Job descriptions for I&R Call Specialists and Resource Specialists should contain similar job duties. If they do not, a disaster job description should be used in training and those staff at the SO should sign the job description indicating they understand the difference in responsibilities.	
Is the staff training for both parties similar and compatible?	Most 2-1-1s use similar training for call and resource specialists, however protocols for managing different types of callers can be different. A review of training materials will help supervisors assess and plan for differences.	

ISSUE	EXAMPLE	IDEAS
If the agreement is for resource database assistance, are the data collection standards similar and are they using the same database?	Nuances of differences in data collection can cause big problems. Consideration should be given to the experiences of 2-1-1s in disasters where they have noted that inclusion/ exclusion policies are suspended, verification processes are altered and other aspects of data collection, including style temporarily change.	
How does the SO gather and report caller data? Will this meet the AO needs?	The reciprocating organizations should agree on what reports will be anticipated and when and how those reports will be provided. Communities generally need reports on demographics, unmet needs, referrals and most common needs.	
How often will disaster training occur for both organizations?	Disaster professionals recommend quarterly or biannual cross training occur. It should include actual transferring of calls and accessing of the resource database.	
What is the plan for supervising the specialists managing calls/resources from the AO?	Both agencies should have a protocol in place for how staff at the SO handling calls and resources will be supervised. Agreements should clearly define whose procedures are primary during the implementation of a disaster agreement.	
Who will be monitoring performance and how will each organization's staff be held accountable for the work?	Clear lines of supervision should be established in the agreement and practiced during the disaster drills. The AO may want to consider deploying a supervisor to the SO site to manage issues that may occur in answering calls or managing data. Another approach would be to have supervisors train at the reciprocal site and be familiar with their processes.	
What are the plans for debriefing the SO staff who participated in the disaster call/resource response?	In Section 11, there are ideas for managing daily briefings and debriefings, if telephone systems are operational, these could take place via teleconferencing.	

ISSUE	EXAMPLE	IDEAS
How will the SO be compensated? Per call, per staff member?	Agreements should be clear as to compensation levels. The Texas 2-1-1s transfer calls at a per call rate. Virginia 2-1-1s do not have a compensation rate for disaster related calls.	
What are the plans for communication between the organizations?	A written plan for hourly, daily, or weekly calls should be in the agreement and performed. The plan can be adjusted as the disaster response progresses, but open and on-going communication is key to successful partnership in resource sharing.	
Who and how will the plan be evaluated following the disaster?	In the agreement, an evaluation should occur after each disaster drill that codifies issues and how they have been addressed. Organizations experience turnover and documentation of drills, the issues and the agreed upon adjustments should be catalogued for future review. A disaster drill notebook that contains the agreement and the evaluation of each drill could easily be established for both partners.	
If the AO is going to use individuals rather than a reciprocal agreement with a SO, what are the protocols for transferring calls, supervision, performance review and debriefing?	A biannual review of the protocols should be required for qualifying to serve. Documentation of training and attendance should be kept with disaster protocol and drill information.	
What is threshold for transferring services before and after the disaster?	The organizations should have a clearly defined threshold for what the call and resource staff can manage. It can be that staff can manage up to 100 information only calls and 75 referral calls per day, or a resource specialist can manage 50 new records per day. Each 2-1-1 knows their staff, their community and should be able to anticipate the call types, recognizing that adjustments may need to be made. A threshold can also be set by the SO, that when the volume drops to a specific level—maybe within 10% of pre-disaster levels, then transfer back to the AO could occur.	

ISSUE	EXAMPLE	IDEAS
What is the contingency plan if the telephone software/hardware is damaged by the disaster?	A strong disaster contingency plan builds in redundancy for all hardware and software, as well as advanced planning with the phone company for priority reestablishment of telephone service.	
Is the host of the Internet database located off-site, even out of region to ensure the database remains available?	2-1-1s have strong database back-up plans, but many of them do not consider a regional disaster scenario where back-ups may be destroyed or inaccessible. An Internet host that has back-up in another region should be considered.	
What is the protocol for providing telephone and database access passwords to SO?	A clearly described protocol for how password access to telephones and databases should be in any Mutual Aid Agreement, as well as the level of permissions granted to virtual volunteer users.	
Do confidentiality agreements transfer from SO to AO?	Confidentiality agreements should be reciprocal and addressed during disaster drills. Differences between confidentiality expectations should be resolved in the agreement and acknowledgment of the differences signed by participating staff.	
How will call trends be communicated from SO to AO?	Call trends develop during disasters, communication from the SO to the AO about these trends needs to occur immediately, as the AO may be able to influence changes in service delivery based on service demands. In the Hurricane. Wilma, Rita and Katrina 2-1-1 responses, scripts were developed by the AO and sent to the staff at the SO.	
How will changes in data collection be communicated?	If either parties determines that data collection standards need to be adjusted to meet the rapidly changing disaster environment, a plan for how it will be determined, implemented and managed should be outlined in the agreement.	

Preplanning on the part of partners, as well as biannual drills can mitigate many of the problems experienced in past disasters with Mutual Aid Agreements. Considering the issues addressed above and developing clear response to those issues can free up both organizations to address the legion of other issues that disasters present. 2-1-1s that participated in virtual assistance in recent disasters state that while the technology worked well, the staff supervisors needed additional training in managing the transition from a normal role to an emergency role. Other areas that should be addressed are preparing the staff to be managing disaster calls, including calls that may not be considered normal in the daily operations, such as donation management, missing persons and trauma response calls. These could be presented in annual or biannual disaster preparedness drills. Both organizations should encourage staff to develop personal disaster plans for their family.

Review

The participating organizations should develop call and resource volume thresholds in which they pre-determine when calls are transferred to another site or when resource specialists are enlisted to assist in managing data.

Details such as job descriptions, disaster training, data collection protocols, technology transfers, and supervision protocols can and should be resolved prior to a disaster.

Disaster training for all staff at both organizations should occur, at a minimum, one time annually. The disaster drills should include real-time transfer of calls and practice in managing the database resources. Passwords and logging procedures should also be practiced.

Individuals who will be utilized as call or resource specialists should be qualified biannually through required training and/or drills.

Staff should be encouraged to develop a family disaster plan.

Case Study

The 2-1-1 in Maine has partnered with the 2-1-1 in Alabama to handle overflow calls. The Mutual Aid Agreement was developed and signed two years ago and only one practice drill has occurred —13 months ago. A hurricane in now in the gulf and the Alabama 2-1-1 has contacted Maine's 2-1-1 to make sure the agreement will be honored. What are the most important steps for Maine 2-1-1 to take to ensure the agreement will work successfully if the Hurricane hits?

A. Verify the threshold for transferring calls, ascertain if there have been any changes in call specialist training, test the call transfer protocol.
B. Review all parts of the agreement and see if there have been any major changes.
C. Plan for a short drill for both parties to review and test the agreement.

B. With the imminent arrival of a disaster, the parties may want to review the agreement first and then schedule a short drill to prepare both organizations.

Things to Consider

The supporting organization should have a plan in place for the steps they will take if the call volume becomes more than what they can handle. Will they use volunteers to assist in call management?

Objectives

Increase knowledge of need for debriefing in disaster response.

Learn steps for applying de-briefing processes in the 2-1-1 post-disaster setting

Increase knowledge of the stress reactions during and following a disaster response

Discussion Questions

What are the emotional and physical stressors you hear daily from 2-1-1 callers?

What would be the similarities and differences between daily 2-1-1 calls and disaster related calls?

How many times has the 2-1-1 been involved in managing callers who have lost loved ones or have children or family members missing? How would the 2-1-1 staff react if they took 100 missing persons calls per day?

Volunteers add a new dimension to managing a 2-1-1 center. Have you considered how you would manage the behavior of someone new in the center that is being impacted by the trauma of disaster calls?

Consider how a disaster could impact you. Describe the different ways you would react in calling the 2-1-1 seeking assistance

Narrative

Following every disaster more research emerges about crisis incident de-briefing or trauma de-briefing. It is a practice that has played an important role in assisting first responders and disaster responders to manage the death, injury and devastation they experience in their routine jobs. American Red Cross and FEMA have recognized the emotional and physical toll of being a witness to death and destruction. I&Rs and Crisis Intervention Centers train their staff to become aware of stressors and in some centers, policies and procedures are in place for assisting professionals who experience particularly horrific calls. For example, some 2-1-1 centers require staff to meet with a supervisor after handling a suicide call and before taking the next call. The supervisor monitors the staff's reaction and determines if the staff person needs time to process the call and their emotional response. Those 2-1-1s who have experienced disasters and the resulting call surges state emphatically that disaster calls are different. Debra Harris, the 2-1-1 Manager for Tampa Bay area and a trained Crisis Responder said "crisis trained does not mean disaster prepared." Karen Hyatt, a veteran American Red Cross mental health professional and the Co-Chair of the AIRS Disaster Response Team said "Seasoned disaster workers with American Red Cross and FEMA know in advance that the assignment you are prepared to perform seldom ends up as what you find yourself doing." This describes disaster I&R.

There are many ways the impact of the disaster work manifests in 2-1-1 workers. Some may cry, be angry, become irritable, have trouble concentrating, alter their eating patterns, or have difficulty sleeping. All of these are normal for even the most experienced disaster workers, but when they begin to build and are not addressed they can impact the effectiveness of the 2-1-1 volunteer.

What makes disaster I&R calls different from routine I&R or crisis calls?

- The sheer volume of calls: 2-1-1 centers have reported 100% to 5000% increase in call volume.
- It is usually both a crisis call and an I&R call.
- Frequently there is no easy referral or assessment tool that will relieve the callers concerns.
- There are a sustained number of highly emotional calls and 2-1-1 workers may take up to 200 calls per day per person.
- The resources change rapidly in both availability and location.
- The emotional context of each call is taxing. The 2-1-1 professional repeatedly becomes a vicarious witness to the death, injury, devastation and impact of the disaster over and over again.

This section will provide steps to mitigate and address disaster related stress before, during and after the volunteer experience.

Before

Before the volunteer agrees to deploy for a disaster, the host organization should provide them with tools to prepare themselves for the experience. NENA has developed a training series for 911 workers deployed to assist other 911 centers following a disaster. It focuses on what to expect when they arrive and how they should mentally and physically prepare for the experience. A reminder to the recruiting organization: key characteristics of a good disaster volunteer are flexibility, a sense of humor and I&R/Crisis skills. Providing volunteers with a mental picture of the community, its traits, its languages and ethnic/cultural uniqueness are tools that can be captured prior to a disaster and distributed to newcomers. A sample pre-deployment document can be found in Appendix D.

Orientation is another important step in the process. The volunteer manager or the person responsible for orientation and training should distribute information on current disaster conditions, resources available, maps and local contact information to help to volunteer acclimate to the site. As much as possible, orientation and training should define the organization's expectation of the volunteer and make sure the volunteer has an opportunity to express any questions or concerns regarding their own expectations.

During

A briefing held everyday at the beginning of each shift should become a regular practice. During the session, the volunteer manager/shift supervisor can review changes from the previous shift, answer questions or respond to concerns that may have arisen during shifts. It is also an opportunity for the supervisor to monitor emotional and physical health of volunteers and staff.

Many people are unable to perceive their own limitations and may need assistance in recognizing them. It is common for people working in disasters to neglect their own need for reasonable breaks. Self-care is the strongest preventative tool to burnout, but some volunteers and staff may feel obligated to stay and work long after they should. While this dedication is admirable, overwork will produce negative results and will harm both volunteers/staff and callers rather than help them. A process for making sure volunteers know they are being monitored to ensure they do not become overly stressed or fatigued is essential. If the resources are available, a trained member of a Crisis Response Team or someone trained in crisis incident de-briefing could be circulating through the 2-1-1 speaking to volunteers and staff throughout the day, reminding them to take their breaks and to eat and drink. Make sure they are diplomatic and grateful to volunteers/staff who want to work more than they should, but they must be firm in encouraging the volunteers/staff to take care of themselves and may even have to relieve them of their duty until the next day if necessary.

Each shift, the departing staff and volunteers should attend a de-briefing. This should be facilitated by a trained professional who can elicit discussions helpful in putting the experiences of the shift into perspective, as well as help to prepare the next shift. It is also an opportunity to monitor the 2-1-1 workers on a regular basis.

Confidential counseling should be made available to any staff or volunteer that requests it or has demonstrated a combination of stress symptoms. All staff and volunteers will probably experience one or more symptoms of stress, but when multiple symptoms begin showing up at the same time, intervention must occur.

After

After a volunteer leaves the disaster location and returns home, there are other expectations they need to be aware of and prepare for. The home organization may have been working short-handed during their absence and be anxious for the volunteer to resume their duties. Meanwhile the volunteer may be returning emotionally and physically exhausted and have difficulty transitioning back into the workplace and normality. The disaster 2-1-1 should assign a designated staff person to stay in touch with volunteers regularly and provide outlets for the volunteer to process their experiences as they move back into their home environment. Regularly scheduled conference calls where volunteers can call in and touch base with each other and continue to process their experiences can be valuable in the transition back home.

Throughout the recruitment, orientation, training, and disaster assignment a volunteer should be aware they can opt out and go home any time. This should be stated both in writing and verbally. An individual who can recognize his/her own limitations and determine he/she can no longer be effective should be given deserved respect. A process for making sure volunteers know they are being monitored to ensure they do not become overly stressed or fatigued is critical. Again many people are unable to perceive their own limitations and may need assistance recognizing them. It is hard for crisis, mental health and 2-1-1 workers to see themselves as being unable to manage the stress of a disaster. The opportunity to reiterate that there is nothing “normal” about a disaster and there is no way to predict or anticipate how it will impact an individual can be helpful when intervening with a volunteer professional.

It is important to recognize that volunteers answering calls virtually at remote sites are susceptible to the same stressors. Briefing and debriefing services should be made available to them. These can be accessed through the resources of the partner 2-1-1, but it the responsibility of the disaster 2-1-1 to ensure they are offered and provided. Daily conference calls while the disaster is ongoing and then monthly or quarterly follow-up calls after the return to normal services are advised.

Review

Documents that describe the community can be prepared in advance to help a volunteer coming in from out of town to understand the community and its unique characteristics. Disaster impact information can be added at the time of the disaster.

Before a volunteer comes to a site, the 2-1-1 can mentally prepare them for the experience by sending them details about what they can expect.

During a disaster, use professionals to monitor the volunteers during each shift, use daily briefings and debriefing session to address the emotional impact of the disaster calls and environment.

Long-term follow-up is advised for volunteers and staff to ensure that their return to a new “normal” is facilitated.

Case Study

A 2-1-1 supervisor overhears a volunteer getting angry with a caller, culminating in the volunteer raising their voice on the call and telling the caller “I am sorry, but I can’t help you with your problem today” and hanging up. Does this volunteer need to be sent home? Why or why not?

A. Yes, it is never permissible to yell at a caller.

B. Yes, but they can come back when they feel better and if they promise never to yell at another caller.

C. No, this is a common stress reaction and the volunteer needs time to debrief and recognize what triggered the reaction. At that point, a supervisor can determine if the volunteer needs to be relieved for the day.

D. No, but they should be under close observation and supervision the rest of the day.

Answer: C. One stress reaction is generally manageable. It is when several stress reactions begin to manifest at the same time that a supervisor will need to determine whether a volunteer (or staff persons) needs to be relieved from the phones and seek professional assistance before returning.

SECTION 12
PROGRAM EVALUATION

Objectives

Increase the knowledge for reviewing organizational processes

Develop processes for evaluating volunteer and volunteer management procedures

Narrative

As the disaster 2-1-1 completes its disaster relief and recovery efforts the final step is to review how the disaster preparedness plan worked and within that process assessing the volunteer management plan. Both the volunteers and staff should be part of the evaluation. As volunteers leave the disaster site, they should complete a confidential exit interview where they have an opportunity to measure the volunteer experience to what they were told to expect.

If there is a strong plan that has been practiced, staff should be more confident in their disaster roles.

If there are well-defined volunteer job descriptions and you recruit, place and train to those job descriptions you should have volunteers with strong abilities and skills.

If volunteers are placed appropriately, know what is going on around them, feel valued and a part of the solution and are well-supervised, they will have a meaningful experience.

If the majority of the volunteers had a meaningful experience and assisted the 2-1-1 in carrying out their mission, then the plan worked.

The 2-1-1 can learn a lot from the volunteers that did not have a good experience as well as the ones that did.

Improving the 2-1-1s ability to effectively respond to disasters through the use of local, out-of-town or virtual volunteers is the ultimate goal.

Have the staff evaluate their experience working with the volunteers and get feedback from the volunteers on their experience working with other volunteers and with staff. If it is a virtual agreement, ascertain how the transfer of phones and/or resources worked

A sample program evaluation and exit interview can be found in Appendix D. Review the results and use them to implement the improvements. Share the 2-1-1's experiences with other 2-1-1s so they may improve their process. Program evaluation fosters program improvement and enhanced service delivery.

Review

Have all volunteers and staff respond to an evaluation of the volunteer management process.

Have all volunteers complete an exit interview.

Compile the results and analyze the areas where the 2-1-1 did well and the areas where improvement could take place.

Change the plan and its corresponding training to reflect the results.

Alliance of Information and Referral Systems has a series of documents posted on their website including *Business Contingency Plans*, template for an *I&R Emergency Plan*, and sample *Memorandums of Understanding*. For more information go to: www.airs.org

Alliance of Information and Referral Systems ABC of I&R has training on disasters for I&R Specialists and Resource Specialists. For more information go to: www.airs.org

The Centers for Disease Control and Prevention have links to fact sheets on illnesses, as well as information on how to prevent diseases from spreading. For more information go to: www.cdc.gov

Corporation for National and Community Services (CNCS) has an *Effective Practices Collections* specific to managing volunteers during disaster. The series can be found at: www.nationalserviceresources.org/epicenter/practices/index

The Department of Homeland Security has a website that features disaster preparedness materials for families, kids and for businesses. The site is useful for staff and volunteers who need to create a disaster response plan for their home or for 2-1-1s looking to start business continuity plans. The site is: www.ready.gov

Federal Emergency Management Agency (FEMA) has an online training series which includes a section called *Developing and Managing Volunteers*. For more information go to: www.fema.gov/emi

Lutheran Disaster Response has developed a volunteer toolkit for their faith-based disaster response teams. For more information go to: www.ldr.org

National Human Services Assembly has produced a white paper outlining the need for systems to be in place to manager disaster volunteers called *From Research to Action*. For more information go to: www.nassembly.org

National Voluntary Organizations Assisting in Disasters (NVOAD) Volunteer Management Committee developed a white paper in 2003 called *Managing Spontaneous Volunteers in Times of Disaster: The Synergy of Structure and Good Intentions*. For more information go to: www.nvoad.org

The National Weather Service lists weather conditions, watches and warnings by location. For more information go to: www.nws.noaa.gov

The federal government now mandates that local, regional, state, tribal and federal government entities organize their disaster management response through an *Incident Command System (ICS)*. For more information on the ICS go to: www.fema.gov/NIMS

United Way of America has developed disaster preparedness tools for 2-1-1 centers. Those tools are available through the United Way of America 2-1-1 staff. They can be reached at: 1.800.892.2757‹ Ext. 211

APPENDIX B
DISASTER 2-1-1 ACRONYMS

AIRS — Alliance of Information and Referral Systems, a membership organization that provides professional training, accreditation and certification for 2-1-1 centers, helplines and information and referral centers, as well as specialized I&R centers throughout the world.

ARC — American Red Cross, a disaster response and service agency.

CAN — Coordinated Assistance Network, works with the disaster sector to support an enhanced overall system of disaster relief in America.

CNCS — Corporation for National and Community Services, a non-profit organization that provides oversight and support for federally funded volunteer management programs such as AmeriCorps and Citizens Corps.

DHS — Department of Homeland Security, the agency responsible for managing domestic incidents and disasters in the United States.

EOC — Emergency Operations Centers, management stations created in disaster areas. They may be managed by FEMA if they encompass an area that has been federally declared a disaster.. They are the one-stop center for citizens to access the federally available assistance. In some disaster areas, 2-1-1 representatives have been asked to be available to provide I&R to citizens on a walk-in basis.

FEMA — Federal Emergency Management Agency, a part of the Department of Homeland Security.

HSPD — Homeland Security Presidential Directives, the presidential decision that created the Department of Homeland Security and the related mandates for how government incident management would be structured.

ICS — Incident Command System, a command structure mandated by the federal law for government agencies preparing for disaster response.

I&R — Information and Referral, the act of linking persons in need to information and/or resources to meet the need.

NENA — National Emergency Number Association, membership organization comprised primarily of 9-1-1 centers.

NIMS — National Incident Management System, the federal mandate outlining how government agencies should respond to disasters (incident) in order to be reimbursed for allowable expenses.

NVCN — National Volunteer Center Network, a membership organization comprised of Volunteer Centers throughout the USA.

NVOAD — National Voluntary Organizations Active in Disasters is a national coalition of secular and faith-based organizations that have clearly defined disaster missions and inter-organizational agreements defining how they will work together. There are local VOADs in many communities that are affiliated with NVOAD.

2-1-1 — the three-digit dialing number assigned by the Federal Communications Commission (FCC) and used by communities to access information and referrals on health and human service resources.

UWA — United Way of America is a membership organization that provides support and services to the local and state United Ways throughout the United States. Many United Ways support and host 2-1-1 centers locally and regionally.

Additional disaster terms can be found at: www.fema.gov

Listed below are recommendations for areas that could or should be addressed in a mutual aid agreement with another 2-1-1 or I&R center.

- Record the formal names of the services and the emergency contact information including home and cell phone numbers.

- The anticipated number of calls or resource information that would be requested or handled by the center, the number of I&R/Resource Specialists that would be made available or what call volume could be managed.

- The conditions that would trigger the aid agreement such as a surge in call volume of 50% or an increase in resource data surpassing 20 additional new resources per day.

- An annual date for reviewing the agreement and testing the conditions of the agreement. All staff of the centers should participate and document the participation in an annual disaster drill.

- Determine and document the conditions for supervision of the calls and/or resources. How will performance be measured and accounted?

- Payment for service: per call, per resource, hourly, fee based or set amount determined by length of service. If staff is deployed to the affected area, who will pay salaries, benefits, transportation, lodging and related travel expenses?

- Mutual aid: will it occur virtually through a transfer of calls or fax/e-mail of resource information? Will mutual aid mean the deployment of staff to the affected site?

A sample Mutual Aid Agreement and a Memorandum of Understanding outline from a consortium of 2-1-1 follows on pages 38 and 39.

SAMPLE MEMORANDUM OF UNDERSTANDING FROM 2-1-1 CONSORTIUM

Emergency plan for high call volume at 211's in a localized disaster

2-1-1 call centers located in Connecticut, Atlanta, San Diego, and Nashville wish to work together to help each other handle substantial call volume increases during localized disasters.

Here are the rules:

1. If a call center is experiencing high call volume due to a localized disaster, the disaster call center (DCC) will call the helper call centers (HCC) to verify that the HCC's can handle extra call volume BEFORE sending any calls to the call center. The HCC has the right of refusal and will expect the DCC to provide
   a. an estimate of the call volume that will be forwarded to the HCC
   b. a list of the most relevant resources
   c. a projected date when the calls will stop coming to the HCC
   d. instructions on how to obtain additional information
2. The DCC pays for the call forwarding costs (800# charges).
3. HCC's can decide to stop handling the DCC's calls at any time and the DCC must stop forwarding the calls to the HCC's within 1 hour of their request.
4. All call centers will send an updated pdf of their database to the other centers quarterly. This will help if there is any problem with the Internet database connections.
5. Each center will identify a central point of contact and a substitution for the other centers. Contact information shall include office, home, and cell phone #'s and email addresses.

APPENDIX D
VOLUNTEER MANAGEMENT SAMPLE DOCUMENTS

SAMPLE DISASTER VOLUNTEER JOB DESCRIPTION

Job Title:
Disaster I&R Specialist

Purpose:
To answer calls at the 2-1-1 and link callers to health and human services

Key Responsibilities:
The Disaster I&R Specialists will answer incoming calls at the 2-1-1, assess callers' needs and make appropriate community referrals. The Specialist will also be responsible for documenting demographics, caller needs and referrals provided. Must be prepared to respond to up to 100 callers per day.

Location:
Worksite either in disaster region or at site of mutual aid partner

Supervision:
Jane Smith, Volunteer I&R Supervisor

Length of Service:
2 weeks

Time Commitment:
Five days per week; 8-hour shifts

Qualifications:

Certified I&R Specialist (CIRS) or

Current license in mental health discipline

Ability to communicate effectively verbally and in writing; bi-lingual preferred

Computer proficient

Ability to multi-task in constantly changing environment

Flexible

Self-motivated

Willing and able to follow instructions

Benefits:

- On-site training
- Housing
- Insurance
- Meals
- Transportation

Required Preparation:

Documentation of having taken the AIRS Disaster I&R Specialist training

Review and signature acknowledging the review of orientation and preparation packet

SAMPLE DISASTER VOLUNTEER MANAGER JOB DESCRIPTION

Job Title:
Disaster Volunteer Manager

Purpose:
Recruit and manage volunteers to respond to disaster 2-1-1 calls and manage disaster resources.

Key Responsibilities:
The Disaster Volunteer Manager is responsible to:

Recruit, screen and qualify appropriate volunteers to assist in the 2-1-1

To act as liaison with the local volunteer center to provide coordinated and seamless services to the disaster volunteer community

Coordinate the deployment of volunteers to assist 2-1-1 in responding to calls

Provide for supervision, evaluations and follow-up with volunteers

Provide for logistics to ensure housing, meals, transportation and training are available throughout the volunteer experience

Location:
Worksite either in disaster region or at site of mutual aid partner

Supervision:
Operations Manager

Length of Service:
Minimum: 2 weeks

Time Commitment:
Five days per week; 8 hour shifts

Qualifications:

Certified I&R Specialist (CIRS) or Current license in mental health discipline

Experience in volunteer management

Experience in disaster management

Ability to communicate effectively verbally and in writing; bi-lingual preferred

Computer proficient

Ability to multi-task in constantly changing environment

Flexible

Self-motivated

Willing and able to follow instructions

Benefits:

- On-site training
- Housing
- Insurance
- Meals
- Transportation

Required Preparation:

Documentation of disaster management experience

Review and signature acknowledging the review of orientation and preparation packet

SAMPLE MENTAL HEALTH SPECIALIST JOB DESCRIPTION

Job Title:
Disaster Mental Health Specialist

Purpose:
Monitor the stress of the incoming demands on the 2-1-1 volunteers and staff. Develop and maintain a daily briefing and debriefing process for all 2-1-1 members.

Key Responsibilities:
The Disaster Mental Health Specialist is responsible to:

Provide basic training related to disaster related stress as it affects callers, self and co-workers

Provide initial post disaster counseling as appropriate

Observe and assess staff who may be demonstrating signs of stress and intervene as appropriate

Location:
Worksite either in disaster region or at site of mutual aid partner

Supervision:
Disaster 2-1-1 Manager

Length of Service:
Minimum: 2 weeks

Time Commitment:
Five days per week; 8 hour shifts

Qualifications:
Current license in mental health discipline

Experience in volunteer management

Experience in disaster management

Ability to communicate effectively verbally and in writing; bi-lingual preferred

Ability to multi-task in constantly changing environment

Flexible

Self-motivated

Willing and able to follow instructions

Benefits:

- On-site training
- Housing
- Insurance
- Meals
- Transportation

Required Preparation:
Documentation of disaster management experience

Documentation of professional mental health license, training and experience in disaster mental health

Review and signature acknowledging the review of orientation and preparation packet

SAMPLE
VOLUNTEER JOB
APPLICATION FORM

NAME

ADDRESS

CITY STATE ZIP CODE E-MAIL ADDRESS

HOME PHONE CELL PHONE WORK PHONE

EMERGENCY CONTACT RELATIONSHIP PHONE

Skills & Education

DEGREE INSTITUTION GRADUATION DATE

PROFESSIONAL LICENSES/CERTIFICATIONS

LANGUAGE/S SPOKEN FLUENTLY

CURRENT OCCUPATION EMPLOYER NAME

ADDRESS PHONE

Experience (begin with most recent)

POSITION ORGANIZATION DATES OF EMPLOYMENT

Volunteer Information

Position Requested:

❑ I&R SPECIALIST ❑ RESOURCE SPECIALIST ❑ MENTAL HEALTH WORKER
❑ I&R SUPERVISOR ❑ INFORMATION TECHNOLOGY SPECIALIST ❑ OTHER ____________

AVAILABILITY DATES

Do you have access to a vehicle or housing in the assigned disaster area? ❑ YES ❑ NO

References (provide the names and contact information for three persons (not relatives or friends) that can attest to your work experience:

Verification and Consent for Background Check

I verify the above information is accurate.

I give ________________________ permission to inquire into and verify my educational background, references, licenses, police records and employment history. I also give permission to the holder of any such information to release it to ________________________.

I agree to hold harmless (name of agency) from any liability, criminal or civil, that may arise as a result of the release of this information about me. I also hold harmless any individual or organization that provides information to the above names organization. I understand (name of agency) will use this information only as a part of its verification of my volunteer application. I understand this information will be maintained in confidential files and accessible only to authorized agency personnel.

PRINT NAME SOCIAL SECURITY NUMBER

SIGNATURE DATE

WITNESS DATE

SAMPLE VOLUNTEER INTERVIEW RECORD FORM

NAME OF VOLUNTEER

INTERVIEWER DATE

Review Application and Verified all information is correct

Review Job Position Description

Questions
What qualifications do you currently have that could assist the agency in meeting its disaster mission?

What is your motivation for volunteering for this disaster position?

Describe the most satisfying part of your current job.

Describe the least satisfying part of your current job.

Name the characteristics you prefer in a supervisor.

Name some of the emotional and physical challenges you expect to encounter in managing disaster I&R calls.

What questions can I answer for you?

Do you have any physical or dietary limitations that the agency will need to accommodate if you are asked to travel to the disaster site?

SAMPLE
INTERVIEWER
ASSESSMENT FORM
(TO BE COMPLETED
FOLLOWING INTERVIEW)

Disposition

Interpersonal skills

Reactions to questions

Physical or dietary restrictions

Recommended Action

Place as ______________________________ Available ____________________

Consider/hold in reserve for the position of ______________________________

Additional investigation required ____________________________________

Not suitable for the agency at this time ❑

Notification

Volunteer notified ____________________ ❑ PHONE ❑ MAIL ❑ E-MAIL
DATE

____
STAFF SIGNATURE

SAMPLE PRE-DEPLOYMENT LETTER

AGENCY LETTERHEAD

Date

Dear (volunteer name),

Thank you for agreeing to serve as a 2-1-1 (title). Please note below the dates of your assignment. We would appreciate it if you would read all of the contents of this letter and when you have completed it, e-mail (name) at (email address) and acknowledge the receipt of this letter and provide her with your arrival and departure information.

Volunteer Position: ____

Dates of service: ____

Location of service: ____

In order to make your volunteer experience as meaningful as possible we want to ensure you are emotionally and physically prepared for the disaster 2-1-1 environment.

Working Conditions

The working conditions are intense, but the call volume is decreasing daily.

Space: the site for our 2-1-1 is very crowded with over 50 volunteers answering calls in the call center. You must be ambulatory, the site does not meet ADA standards for accessibility.

Telephones: The telephone system is operating, but we are still having problems maintaining long distance connections.

Resource Database: The internet connection to the resource database is still sporadic, so several times a day we have to capture our data by hand. The resources change constantly, so we have volunteer Resource Specialists assisting us in maintaining the data.

Call volume: You can expect to be answering calls constantly. We are still experiencing an abandonment rate of close to 25%, but we expect that to improve as more volunteers like you arrive to assist us.

Staff: We have a fantastic, talented staff that has been working 24/7 for five weeks, many with their own loss. We would appreciate it if you would be sensitive to the stressors they have experienced and recognize that their own sense of community keeps them coming into the 2-1-1 center each day.

Cultural and ethnic communities: Our community is multi-lingual with neighborhoods where English is not the primary language. We have staff and volunteers recruited that are bi-lingual, but we ask that you are sensitive to the issues of diversity in our community.

Housing, Meals and Transportation

Housing: Currently there are no hotel rooms available. You will be staying at a local community member's home. You will be provided with a bed and access to a bathroom with a shower and your host will provide you daily transportation to and from the 2-1-1 center.

Meals: Meals are provided daily by either the American Red Cross or one of our local disaster serving organizations. If you have special dietary needs, we may not be able to meet them. The grocery stores have limited stock and there are only a few restaurants currently operating. Please feel free to bring your own food, but keep in mind that refrigeration is not readily available.

What to pack

Comfortable clothing: At this time staff are wearing what they have available, so comfortable clothing is the rule. The 2-1-1 will provide you with several t-shirts with our logo so you will be easily identifiable when you are in the center and in the community. Pack enough clothing for your entire stay. More than 50% of our citizens have only sporadic access to utilities and laundromats are not available.

Snack food: If you prefer, you are welcome to bring your own snack foods with you.

Cell phones: The local cell towers are working, but cell traffic is very heavy and it is still difficult to get a call in and out of the region.

Alarm clock: You will be working 8-hour shifts and we cannot guarantee your host family will have an alarm clock in every bedroom.

Books or other hobbies/interests: In your down time you will want to have something to do that feels familiar to you. This is highly recommended as a way to manage stress.

Identification: Please bring two forms of picture identification with you.

Pre-deployment Packet: Please bring this packet with you.

Emotional Preparation

You will be asked to monitor yourself for stress and fatigue. The working conditions add to the stress of managing a high volume of emotionally charged calls.

You will also be monitored for stress by either a mental health professional or a peer trained in crisis incident management. These people are charged with ensuring all volunteers and staff takes breaks from their duties, that they de-brief daily and have tools to manage the disaster environment.

Some of the most common signs of crisis induced stress:

Fatigue

Irritability

Difficulty concentrating

Mistakes on the job

Emotional outburst not relative to the situation

You will receive performance appraisals daily the first three days, at the end of the first week and at the end of your deployment. If you are on loan from another 2-1-1 center and being compensated by that center, a copy of the final appraisal will be forwarded to your employer.

When you have read this information, please e-mail (email address) and provide us with the following information:

Full name

Where you are coming from—name of organization, city, and state

Form of transportation (air or car—the trains and buses are not operating) Please make airline reservation into the (name of airport).

Date and time of arrival

Airline name and flight number

Date and time of departure

Airline name and flight number

continued on next page

After you send the email, please follow-up with a phone call to (telephone number) and leave a message with the same information. Because our internet and telephone systems are working below capacity right now, we want to make sure we get your information.

When you arrive

You will be met at the airport by a representative of the 2-1-1. They will have a large red sign with "2-1-1" on it.

They will transport you to a staging site where you will receive your housing assignment and an orientation to the community and the disaster.

After the orientation, you will be taken to your housing site and given time to unpack. Depending upon the time of your arrival, you may go directly to the disaster training site to receive instruction on how to use our telephone and resource databases, and receive an overview of community disaster resources.

You will be partnered with a staff person or an experienced volunteer to assist you in learning the local resources. They will also be supervising you and writing your performance appraisals.

Final Thoughts

Thank you for agreeing to assist the 2-1-1 in this disaster. You have been selected to assist not only for your I&R experience, but also for your flexibility, your sense of humor and your compassion. If you have questions or concerns, please contact (name) at (telephone and email).

Please let your family know that the telephone systems are working, but that emergencies and helping people locate resources are still priority. You may not be able to call them everyday. Generally the phone lines are more available late in the evening or in the early morning.
We want you to be able to call home, but we also want you to be aware of some of the limitations.

Sincerely,

SAMPLE ORIENTATION CHECKLIST

Welcome

- ❑ Sign volunteer job descriptions
- ❑ Sign volunteer waiver and/or agreements
- ❑ Provide disaster 2-1-1 identification

Introduction to the trainer and 2-1-1 staff present

Review administrative details

- ❑ Phones
- ❑ Parking
- ❑ Restrooms
- ❑ Breaks
- ❑ Meals—where they will be provided and when
- ❑ Housing—introduce them to their host if possible
- ❑ Check-in/out procedures—everyone must sign in/out everyday

Materials to review

- ❑ Mission statement
- ❑ Summary of disaster conditions and organization's role in disaster
- ❑ Disaster organization chart
- ❑ Policies and procedures
- ❑ Emergency procedures
- ❑ Confidentiality and/or HIPAA review
- ❑ Map of community
- ❑ Map of facility

SAMPLE TRAINING CHECKLIST

Introduce volunteers to staff who will be partnered/supervising them________________________
NAME

Review job descriptions and expectations ____

Review shift : ____________________days and time ________________________

Telephone system: Password to sign-in/out _______________________________

- ❑ How to transfer calls
- ❑ How to place on hold
- ❑ Other.....
- ❑ Supervisor will be randomly monitoring calls?

Resource database: Password to sign-in/out _______________________________

- ❑ Required demographics from callers
- ❑ Required data regarding needs
- ❑ Required data regarding unmet needs
- ❑ Required data regarding referrals
- ❑ How the data is used (why it is important to capture the data)
- ❑ How rapidly changing resources are managed (white board or database)

2-1-1 Disaster Roles

- ❑ Missing person's reports
- ❑ Gifts and donations
- ❑ Rumor control

Policies and Procedures

- ❑ Required attendance at pre-shift briefings and post-shift debriefing
- ❑ Signing in/out daily
- ❑ Working with your supervisor
- ❑ Review performance appraisal checklist
- ❑ Managing interpersonal conflict

Critical Incident Debriefing

- ❑ All staff and volunteers monitored
- ❑ Professionals available on-site and referrals available after return home
- ❑ Additional assistance available during and following every shift

How to manage stress

- ❑ Talk about it
- ❑ Call home and touch base with your families/friends

SELF-CARE TIPS FROM THE U.S. PUBLIC HEALTH SERVICE, OFFICE OF FEDERAL OCCUPATIONAL HEALTH AND THE CENTERS FOR DISEASE CONTROL

- Accept what you cannot change—the chain of command, organizational structure, waiting, equipment failures, etc.
- Pace yourself and take frequent breaks.
- Establish a “buddy system” to watch out for each other.
- Eat regularly. Avoid sugar and caffeine.
- Get as much sleep as possible.
- Adhere to the team schedule and rotation.
- Talk to people when you feel like it.
- Give yourself permission to feel bad—you are in a difficult situation. Recurring thoughts, dreams, or flashbacks are normal.
- Communicate with your primary social supports as frequently as possible.
- Establish routine activities such as regular meals, rest breaks, washing, and sleeping.
- Limit on-duty work hours to no more than 8 hours per day
- Make work rotations from high stress to lower stress functions
- Recognize and heed early warning signs for stress reactions
- Drink plenty of fluids such as water and juices. Avoid over use of alcohol or drugs.

SAMPLE PERFORMANCE CHECKLIST

The performance checklist should correspond with the job description and training checklist.

NAME DATE

JOB ASSIGNMENT

Job Tasks	Good	Satisf	Poor	N/A	Comments
Answers calls promptly					
Uses database/resources effectively					
Uses telephone system correctly					
Demonstrates skill in managing callers					
Collects appropriate demographic data					
Uses resource data correctly					
Other					
Policies and Procedures					
Maintains confidentiality					
Signs in/out daily					
Reports for shift on time					
Other					
Interpersonal					
Participates in de-briefing					
Works well with others					
Manages emotional and physical needs during work shift					

Additional comments:

APPRAISAL COMPLETED BY DATE

Information provided to volunteer.

VOLUNTEER SIGNATURE DATE

SAMPLE
EXIT INTERVIEW
FORM

This form should capture information regarding the entire experience.

Please mark the response that best describes your experience.

RECRUITMENT AND PRE-DEPLOYMENT/ASSIGNMENT			
Question	**Yes**	**No**	**N/A**
Was the job described the one to which you were assigned?			
Did the organization provide you with info to prepare you for the experience?			
Was the organization prepared for your arrival?			
Did you receive housing and meals information?			

ORIENTATION AND TRAINING			
Question	**Yes**	**No**	**N/A**
Did you receive an orientation to the organization?			
Did the organization provide you with the tools to complete your work daily?			
Did the training assist you in completing your daily work?			

SUPERVISION AND SUPPORT			
Question	**Yes**	**No**	**N/A**
Was supervision available to you throughout your work?			
Did you receive supportive information regarding your performance?			
Was debriefing available to you on a regular basis?			
Were you offered additional services?			

Please provide us with information that you think would assist us in improving our disaster work.

I worked at the 2-1-1 as ❑ I&R Specialist ❑ Resource Specialist ❑ Information Technology Specialist ❑ Mental Health Specialist ❑ Manager ❑ Other

I was at the 2-1-1 site for ❑ 0-3 days ❑ 3-7 days ❑ 8-14 days ❑ 14-28 days ❑ more than 28 days

Thank you for your days, service and the work you performed!

SAMPLE LETTER TO LENDING AGENCY

Date

Executive Director
Agency Name
Address

Dear________________,

Thank you for supporting (your agency name) during the (disaster name) disaster. The 2-1-1 center was a key conduit for linking victims of the storm to the resources the community provided for recovery.

Your staff (name/s) managed over xxx calls in the xxx days they worked on the phones. They became an integral part of the 2-1-1 recovery team. While they were at the 2-1-1 they were monitored for disaster related stress. Our supervisors will continue to follow-up with them and all the staff who were loaned to our organization for the next few months. We would appreciate your support in encouraging them to call in monthly for debriefings and to touch base with the individuals they came to know so well while they were in (city, state). These calls will take approximately 45 minutes and are scheduled as close to the lunchtime hour as possible. The dates and times for the calls are below.

Date	Time	Call-In Number

As a contributing partner, we also maintained performance records on your employees. They received a preliminary performance appraisal and a final appraisal. If you would like to receive copies of these, please have your employee/s sign the release attached and we will be happy to share the information with you.

If you have questions about our follow-up process or anything relating to the volunteer share program, please do not hesitate to contact me at: XXX.XXX.XXXX.

Again, we are grateful for your response to our request for assistance. Without you we would not have been able to assist the thousands of victims needing resources.

Sincerely,

Executive Director/CEO

APPENDIX E
RECRUITMENT IDEAS

Most of the recruitment ideas are for groups that can be approached before a disaster and pre-trained and pre-qualified for work in a 2-1-1 center. At the bottom of the page, there is a list of ideas for recruiting "just in time" volunteer. These are volunteers your organization may have developed an agreement with that could be quickly trained to answer calls. Don't forget to work closely with your local Volunteer Center.

Retirees from the 2-1-1

Other staff in the organization

Professional organizations - psychologists, social workers, family therapists, etc

Social service agencies

Similar businesses, such as call centers

Colleges and Universities

Alumni Associations

Civic Groups - Junior League, Rotary, Ruritan

Churches

Sororities and fraternities

Trade associations

AARP

Community or neighborhood group

Toastmasters

Just In Time volunteers
Specialized I&R Centers

Human Service Agencies—Several 2-1-1 centers have contracts with their local/state health and human service agency for a loan of employees following a disaster.

NASW—Local members of the National Association of Social Workers could supply the 2-1-1 with degreed social workers familiar with the local community.

Own Organization—Many United Way 2-1-1s train their other staff to back-up the 2-1-1 during emergencies. United Way loaned executives and/or campaign staff can be provided an overview twice a year and then given intensive training at the time of the disaster.

College and Universities—An agreement can be made with a department, such as sociology, psychology, social work or nursing to provide an orientation at the beginning of each semester to all students and then, if needed, call-up and provide a "just in time" training. The students generally have a lot of energy and are eager and willing to learn.

AmeriCorps—Developing a relationship in advance with the local AmeriCorps leaders in your area could provide a strong system for additional staff support. Be aware, AmeriCorps will need to be paid for costs incurred in the deployment of their members.

APPENDIX F
VOLUNTEER RECOGNITION

It is important to recognize the staff and volunteers following a disaster.

A formal letter of gratitude should be sent within two weeks of the volunteers' departure.

A token of gratitude is an effective memorial for the energy and sometimes, emotional impact, the disaster had on a volunteer. Here are some ideas from previous disasters:

A piece of the building mounted on a plaque (Oklahoma City bombing)

A piece of wood pierced by barbed wire (Texas tornadoes)

A picture of the 2-1-1 center (Texas/Louisiana hurricanes)

A state pin with a ribbon recognizing the survivors (New Jersey 9/11)

A clock and personalized card of thanks (Louisiana hurricanes)

The volunteers become survivors as well as supporters. Providing them with a meaningful and lasting token of gratitude helps them to assimilate back into their lives, but also ensures they will never forget their experience, and shows that their efforts were recognized and significant to the community.

APPENDIX G
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