

# Donations Management Plan Assessment Tool



## Introduction

This plan assessment tool is a resource to help you evaluate the degree to which you have planned and prepared for donations management following an incident. It is intended for use by emergency preparedness planners and other personnel with responsibility for developing or updating a donations management plan.

The tool is designed to walk you through a general concept of operations that addresses various strategies pertaining to donations management. Each section includes a list of considerations for the given strategy drawn from current subject matter guidance and best practices. Evaluate your plan against the items in the tool to ensure that your plan more fully addresses each strategy.

NOTE: While this tool was developed with local governments in mind, it is still applicable to other entities with donations management plans, policies, or procedures.

## Concept of Operations

### **Strategy One:** Activate Donations Coordination

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A Donations Coordination Team (DCT) is convened to determine strategies to address donations (solicited and unsolicited), identify donations resources, and coordinate across local, regional, and state donations management programs following disaster. It is composed of various members, including local government, the business community, and voluntary organizations. Does your plan include the following:

- A list of organizations that will participate on the DCT
  - Is there a memorandum of understanding (MOU)/memorandum of agreement (MOA) established with these organizations? Is it current?
  - In lieu of an MOU/MOA, are the organizations signed on to the plan?
- Triggers associated with activating the DCT
  - When should the DCT be stood up?
  - Who will be part of the DCT? Is it the same partners every time?
  - What determines whether or not you decide to stand up your plan?



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- Roles and responsibilities of the DCT and its participating organizations
- Language that addresses sending a liaison to the EOC to facilitate information flow between the EOC and the DCT
  - Has this position been identified?
  - Information about establishing a briefing schedule

## **Strategy Two: Identify and Open Suitable Facilities**

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A number of facilities are necessary to accomplish donations management operations, including collection centers, resource staging areas, warehouses, distribution centers. Does your plan include the following:

- Information about the following kinds of facilities: multi-agency warehouses, receiving centers, processing centers, distribution centers
  - Who can access the warehouse as a vetted organization?
  - How long will the facility be needed?
  - How long will the facility be available?
  - Does the plan address providing survivors transportation to and from distribution centers?
- A discussion about whether or not each type of facility should be opened given the scope of the incident
- A list of pre-identified and vetted facilities that could possibly be used for donations management operations
- Information about providing space and equipment to the nonprofit organization that will be running facilities
- A point of contact in the EOC who may be reached for any issues at the facility or with the equipment
- Information about maintenance and logistics
  - Does the plan address preparation and maintenance to clean and repair the facility and to prevent attracting rats, mice, and insects?
  - Does the plan address working with the facility manager to coordinate infrastructure, connections, and general logistics?
- Information about security at the facility

- Information about staffing requirements
  - Does the plan identify (at a high level) which organizations are likely to staff which facilities including but not limited to the following:
    - ◆ Adventist Community Services (ACS): provides overall management of a warehouse
    - ◆ Information Technology Resource Center (ITDRC): provides communication and technology
    - ◆ Community Emergency Response Team (CERT): provides manpower
    - ◆ FEMA Corps: provides manpower
    - ◆ Reach Out America: provides warehousing
    - ◆ AmeriCorps: provides manpower
  - If appropriate, are NIMS resource typing definitions considered in the plan?
  - Will spontaneous volunteers be used to staff these facilities?
  - Does the facility adopt an ICS organization chart?
  - Is there a communications flow chart that addresses who talks to whom?
  - Information about tracking the cost of the warehouse for the purposes of reimbursement
  - A process for working with pop-up donations centers (e.g., churches)

### **Strategy Three: Coordinate Donations Management Support**

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Coordination is required across all levels of government and the nonprofit and private sectors to effectively manage donations. Does your plan include the following:

- Information about identifying the community's donations needs, including the following:
  - Types and sizes of unmet resource needs that require funds and which organizations need them
  - Types and quantities of needs for goods and services and which organizations need them
  - Number and locations of warehouses that are open
  - Number and locations of designated reception points and distribution points for goods, vouchers, and gift cards
  - Populations being served
  - The languages, cultures, and other types of access and functional needs being encountered
  - Identification of any other issues that might arise in regard to donations

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- Discussion about different types of donations
  - Cash donations:
    - ◆ Does the plan identify a single, trusted nonprofit organization to collect and coordinate cash donations?
    - ◆ Where are cash donations held to integrate with long-term recovery?
    - ◆ Is a local bank account opened to hold cash donations?
    - ◆ Are cash donations different in the response and recovery phases?
    - ◆ How are local and regional donations differentiated?
    - ◆ Is a separate fund set up for each disaster?
  - Solicited donations:
    - ◆ Do you work with private businesses or faith-based organizations to acquire donated goods, including durable medical equipment and other equipment to support survivors with access and functional needs?
    - ◆ Who has the authority to communicate with private businesses or faith-based organizations to solicit goods?
    - ◆ How do you communicate the need for solicited goods over unsolicited donations?
  - Unsolicited/In-Kind donations:
    - ◆ Does the plan address sorting and palletizing donations?
    - ◆ How do you determine which donations are good or not good?
    - ◆ Does the plan address sending donated food items to the local food bank?
    - ◆ How does the organization dispose of unused or unwanted items?
  - International donations
    - ◆ How are international donations handled?
    - ◆ Who has the authority to accept international donations?
    - ◆ Is there a state or federal point of contact listed for guidance or information about handling international donations (e.g., intricacies of international law, customs, State Department and USAID work)?
  - Volunteer hours
    - ◆ Which plan references how volunteer hours will be tracked—donations management or volunteer management?
    - ◆ Which agency is designated to collect the hours?
- Information about establishing a donations management system to track donations and keep records
  - What is the process for receiving, inventorying, and tracking donations?
  - Does your plan address use of some kind of inventory system, or do you partner with organizations that have tracking systems?

- Is a list of warehouse inventory disseminated to jurisdictions/nonprofit organizations so that they are aware of what is available?
  - Is there a process for jurisdictions/nonprofit organizations to request donations from the inventory?
  - Information about how donated resources (including volunteer labor) can be used to offset the local share required for FEMA disaster recovery reimbursement
- Guidance for continuity of donations management from the short- to intermediate- to long-term

## **Strategy Four: Support Long-Term Donations Management**

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As communities move from the immediate relief phase to intermediate and long-term recovery, donations management procedures adapt to support long-term needs. Does your plan include the following:

- A process that addresses transitioning donations management from immediate needs to long-term needs
- A strategy for transitioning the disaster coordination team to a component under the long-term recovery committee
- Information about how long-term donations (e.g., building materials, furniture, appliances) should be considered and requested from the beginning of the incident
- A process for transitioning to new facilities, as appropriate

## **Strategy Five: Coordinate Public Information**

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Public information is the most critical tool that can be used for effective donations management. Without clear guidance on what, when, and how to donate, the public repeats old patterns, such as bringing used clothing to undesignated sites. From the earliest opportunity and then as long as needed, concise, up-to-date information on what and how to donate should be conveyed to the public. Does your plan include the following:

- Pre-scripted messaging for each phase of the incident, including the following topics:
  - Cash donations are preferred
  - Limit donated goods items that are needed and have been requested by response/relief organizations.
  - Confirm that donations are needed before sending them
  - Donate dry goods, sundry items, and non-perishable foods to the food bank

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- Donate new clothing rather than used clothing
- Donate old clothing to Goodwill or other similar vendors
- Vet that organizations are legitimate before donating to them
- Where to go to donate items
- Whom to call for more information
- Guidance about creating public information in alternate formats, such as multiple languages, large print, Braille, closed captioning, and sign-language interpreting, so that it reaches the whole community, including people with access and functional needs
- Roles and responsibilities for public information related to donations management at the different phases of disaster (i.e., transition from government to non-profit)?
  - Does your plan identify who updates the local websites and social media?
  - Does your plan address how you can use websites and social media for donations management?
- A process for coordinating the messaging with the phone bank to ensure consistent messaging
- A process for monitoring crowd funding websites (e.g., GoFundMe, Kickstarter) for situational awareness purposes

## **Strategy Six: Demobilization**

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Resources should be demobilized as soon as they are no longer needed. When the event winds down and donations are no longer requested and/or needed, any remaining items will either be distributed to local charity organizations or disposed through established waste management procedures. Does your plan include the following:

- A process or checklist for each phase of donations management (e.g., short-term, intermediate, and long-term)
  - Who would be responsible for demobilization?
  - What are your trigger points for demobilization for each phase?
  - How are facilities demobilized?
- Information about disseminating public messaging that facilities are closing and donations no longer being actively managed for this incident
- A strategy for what to do with donations after demobilization
  - Does the plan address completing actions on all resource requests?

- Does the plan address funneling new and existing donations to area agencies?
- How are unusable donated items handled (keeping in mind the implications of media, donor, and public ramifications of getting rid of unusable/unwanted donations)?
- Information about collection of documentation on potential reimbursement for donations management activities
- Information about conducting debriefing for facility staff and volunteers

## **Strategy Seven: Integrate with Other Plans**

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During an incident, many different plans will be activated from the local level and up. The donations management plan should address how it integrates with other local, regional, and state plans. Does your plan include the following:

- Consideration of how other plans address donations management:
  - Does the plan identify other plans that relate donations management?
  - Are the relative plans appropriately referenced in each document (e.g., public information, volunteer management)?
  - Which other local plans should reference donations management?
- Guidance for including your plan and or donations management in local exercises and your local multi-year training and exercise plan
- Consideration for transitioning from the donations management plan to the recovery plan
- Strategies for integrating with other jurisdictions and regional partners on their donations management plans to ensure availability of and to deconflict resources

## **Strategy Eight: Socialize the Plan**

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After your plan is developed or updated, it should be shared with agencies and organizations that have roles and responsibilities in the plan. Does your plan include the following:

- A strategy for ensuring that agencies/organizations with roles and responsibilities in the plan understand their parts
- Guidance for conduct training with agencies/organizations that have roles and responsibilities
- Information about who the plan owner is who has authority to socialize the plan

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- Does the plan address considerations for sharing the plan or key plan actions with all potential response partners, neighboring jurisdictions, and agency departments prior to the incident?
- Does the plan include guidance for sharing the plan with other plan owners locally or within the region?
- Does the plan include guidance for sharing plan actions with the community (e.g., media, community groups, voluntary agencies, non-profit entities, key industry partners)?

## References

You may find the following references helpful in developing your donations management plan.

- *A Whole Community Approach to Emergency Management: Principles, Themes, and Pathways for Action*. Federal Emergency Management Agency. December 2011. Available online at <https://www.fema.gov/media-library/assets/documents/23781>.

- “American Logistics Aid Network.” Available online at <http://www.alanaid.org>.

The American Logistics Aid Network (ALAN) is a consortium of private sector partners who can provide private links to warehouse support, logistics, equipment, etc. and works closely with the National VOAD, FEMA, the Business Emergency Operations Center, and other entities.

- Charity Navigator. Available online at <http://www.charitynavigator.org>.
- *Comprehensive Preparedness Guide (CPG) 101 (Version 2.0), Developing and Maintaining Emergency Operations Plans*. Federal Emergency Management Agency. November 2010. Available online at [https://www.fema.gov/media-library-data/20130726-1828-25045-0014/cpg\\_101\\_comprehensive\\_preparedness\\_guide\\_developing\\_and\\_maintaining\\_emergency\\_operations\\_plans\\_2010.pdf](https://www.fema.gov/media-library-data/20130726-1828-25045-0014/cpg_101_comprehensive_preparedness_guide_developing_and_maintaining_emergency_operations_plans_2010.pdf).
- “Disaster Donations Management.” Texas Division of Emergency Management. December 2014. Available online at <https://youtu.be/UGGCVxup5xI>.
- “Donated Resources (DAP 9525.2).” Federal Emergency Management Agency. February 2014. Available online at <http://www.fema.gov/media-library-data/1393862222813-f19ad8f932e8e1a4a5f6586354af41ed/RP%209525.2%20Donated%20Resources%20Policy.pdf>.
- “Donations Management Process (Flowchart).” Texas Division of Emergency Management. Available by request from TDEM by contacting [IA@soc.texas.gov](mailto:IA@soc.texas.gov).

- *Effective Communications Toolkit*. Texas Disability Task Force on Emergency Management. May 2015. Available online at <https://www.preparingtexas.org/preparedness.aspx?page=df9e78fc-3f14-4c6c-aad8-7a2b90c425ef>.
- *Functional Needs Support Services (FNSS) Toolkit*. Texas Disability Task Force on Emergency Management. April 2015. Available online at <https://www.preparingtexas.org/preparedness.aspx?page=32137bc8-eed7-42bb-ad7e-2765fd8abdb9>.
- *Guidance on Planning for Integration of Functional Needs Support Services in General Population Shelters*. Federal Emergency Management Agency. November 2010. Available online at [http://www.fema.gov/pdf/about/odc/fnss\\_guidance.pdf](http://www.fema.gov/pdf/about/odc/fnss_guidance.pdf).
- *International Assistance System Concept of Operations (IAS/CONOPS)*. Federal Emergency Management Agency. January 2015. Available online at [http://www.fema.gov/media-library-data/1444411200092-5b09869d53801ceb5640c00b2f337e64/2015\\_IAS\\_CONOPS\\_Public\\_Version\\_Accessible.pdf](http://www.fema.gov/media-library-data/1444411200092-5b09869d53801ceb5640c00b2f337e64/2015_IAS_CONOPS_Public_Version_Accessible.pdf).
- “Just In Time EOC Training – Donations Management.” Bay Area Urban Area Security Initiative. July 2015. Available online at <https://youtu.be/AKYnPOFXt2o>.
- “Key Concepts of Cash and In-Kind Match (eCourse).” Corporation for National and Community Service. 2010. Available online at <http://www.nationalservice.gov/resources/financial-management/key-concepts-cash-and-kind-match>.
- NIMS Resource Typing Definitions:
  - Donations Coordinator: <https://rslt.preptoolkit.org/Public/Resource/View/2-508-1042?q=donation>
  - Donations Management Personnel/Team: <https://rslt.preptoolkit.org/Public/Resource/View/2-508-1043?q=donation>
  - Volunteer Agency Liaison – Interim: <https://rslt.preptoolkit.org/Public/Resource/View/2-508-1058?q=volunteer>
- *Public Assistance Applicant Handbook* (FEMA P-323). Federal Emergency Management Agency. March 2010. Available online at [https://www.fema.gov/pdf/government/grant/pa/fema323\\_app\\_handbk.pdf](https://www.fema.gov/pdf/government/grant/pa/fema323_app_handbk.pdf).
- *TDEM State Donations Toolkit* (G-288). Texas Division of Emergency Management. Available by request from TDEM by contacting [IA@soc.texas.gov](mailto:IA@soc.texas.gov).
- “Volunteer & Donate Responsibly.” Federal Emergency Management Agency. Last Updated July 2016. Available online at <https://www.fema.gov/volunteer-donate-responsibly>.

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- “Volunteer and Donations Management Annex.” *National Response Framework*. Federal Emergency Management Agency. January 2008. Available online at <https://www.fema.gov/pdf/emergency/nrf/nrf-support-vol.pdf>.
- *Volunteer and Donations Management Annex (T), State of Texas Emergency Management Plan*. Texas Division of Emergency Management. May 2016. Available online at <http://dps.texas.gov/dem/documents/planState/annext.pdf>.
- “When Disaster Strikes...How to Donate or Volunteer Successfully.” Federal Emergency Management Agency. L-217. August 2007. Available online at [https://www.fema.gov/pdf/donations/when\\_disaster\\_strikes.pdf](https://www.fema.gov/pdf/donations/when_disaster_strikes.pdf).