Unit 7: Information Management

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

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

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

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

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

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1. Describe what technologies can be used to accept and track offers.
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Volunteer and Donations Process Description

Media/Public Interest leads to VDCT Activated
There is a chart showing blocks connected by lines and arrows. The first block is Donors with lines leading to 3 blocks for Cash, Goods, and Services. All three of those blocks have an arrow pointing to a block that says Tech Solution. From there, an arrow points to a block that says VDCT Allocates Offers, and from that, an arrow points to a block for Agency Partners. From Agency Partners, there are lines to 4 separate blocks that read Shipping, Receiving, Distribution, and Affiliation.
In information management, Steps 1, 2, and 4 are specific to the call center or Website. Step 3, Process the Offers, is handled by the VDCT.

- The phone bank is a physical place within a call center.
  - This is where operators answer the donations toll-free number. Therefore, a call center can be a larger operation that encompasses a phone bank. In addition to a phone bank, a call center can also support other areas such as meeting rooms, break room, offices, etc.
  - Call centers may have as few as 1 to 2 people during a small disaster and up to 30 in a large disaster.
The Need for a Call Center

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

Set Up the Call Center

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

• Consider having operators that are bi-lingual.
• TTY capability may be needed.
• Provide training to call center operators prior to an event.
  - During a disaster operation is not the best time for ‘just in time’ or ‘on the job’ training.
  - Have scripts for the operators to use when answering the calls. The script should include instructions on how to refuse an offer politely or re-route an offer.
  - Brief operators before their shift. This keeps operators up to date on what is happening with the disaster.
  - Have reference sheets for operators to use when answering questions.

• Will an established organization/agency set up and manage the call center for you?

• Not all offers will be processed.

• Reasons for refusing offers:
  - Not needed now or ever.
  - Too many restrictions from donor on offer.
  - Legal restrictions.
• **IMPORTANT NOTE:** This step is done by the VDCT based on the needs of disaster or emergency survivors.

• For instance, donors may offer cash. The VDCT may determine that the most pressing need is for deposits for apartment rents.

• Correct categories for processing the offers are as follows:
  - Match (between survivor need and donation)
  - No Match—Refused
  - No Match—Referred
  - No Match—Maintain for Future (within the current disaster OR a future disaster)
• Instead of just closing the center abruptly, first cut back the hours/days of operations.
• Release an announcement about the “scaled back” hours to the Media.
• Put a message about the phone bank hours on the voice mail system.
• Reduce the number of operators and/or their scheduled hours, as needed.
Automated Information Management

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

There are several types of technologies available:
1. Web-Based Technology—Internet
2. Networked computers
3. Stand-Alone Technology—Single, non-network computer
4. Paper-Based Technology—Form template matches computer template

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

Visual 7.13

**Summary**

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

**Post-Course Assessment**

Visual 7.14

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