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**Functional Annex –
Donations Management**

Approved (February 18, 2009)

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1 Purpose

The purpose of this annex is to describe how Washington County will coordinate with Oregon Voluntary Organizations Active in Disaster (ORVOAD), their member volunteer agencies and Oregon Emergency Management (OEM) to manage donations of funds, goods and services that may occur in the aftermath of an emergency situation.

2 Situation and Assumptions

2.1 Situation

- Washington County is at risk from a number of hazards that could trigger an influx of donations, both solicited and unsolicited.
- During emergencies, unplanned deliveries of donated goods and services can disrupt distribution channels and overwhelm local government and volunteer agencies personnel.
- Washington County will coordinate its donation management efforts with volunteer organizations. These organizations will collect, process, and distribute donations to disaster victims.
- The Oregon Voluntary Organizations Active in Disaster (ORVOAD) is a recognized resource and leader for donations management and long-term recovery efforts for residents impacted by disaster.
- Power outages and other infrastructure damages may prevent or delay efforts to communicate specific donation needs and directions to the public.
- Once emergency conditions subside, individuals, businesses and relief organizations from outside the disaster area will begin to collect materials and supplies to send to the impacted area.
- Disaster victims will have immediate and long term recovery needs which can, to some degree, be satisfied by donations.
- Donations received by an ORVOAD agency become the property of that agency and are distributed following their own policies and procedures.

2.2 Assumptions

- The amount of donations received will relate more to media attention than the magnitude of the disaster or the number of victims.
- Washington County and partner voluntary agencies will have adequate, trained personnel to support operations as outlined in this annex.
- Adequate facilities, equipment and other resources will be available to support operations as outlined in this annex.

- Oregon Emergency Management (OEM) will provide necessary staff, equipment and support to activate and maintain Aidmatrix, a Web-based software program enabling donors to list their donations of funds, goods and services.
- Early on, the Washington County Joint Information Center (JIC) will provide dedicated personnel to work with established media outlets to communicate how the public can best help. This quick, proactive response will decrease the amount of unwanted donations.
- Community groups may request donations on behalf of disaster victims, become overwhelmed with a large volume of both needed and unneeded items and then ask Washington County for help.
- The Washington County PIC will be available to provide donations information to the public.

3 Concept of Operations

3.1 Acronyms

ACS	Adventist Community Services
DCT	Donations Coordination Team
DHS	Department of Homeland Security
DM	Donations Manager (aka ICS Donations Unit Leader)
DOC	Department Operations Center
EOC	Emergency Operations Center
FEMA	Federal Emergency Management Agency
IC	Incident Command
ICS	Incident Command System
JIC	Joint Information Center
OCEM	Office of Consolidated Emergency Management
OEM	Oregon Emergency Management
ORVOAD	Oregon Voluntary Organizations Active in Disaster
PIC	Public Inquiry Center
VAL	Voluntary Agencies Liaison
WCLTRC	Washington County Long-term Recovery Committee

3.2 Definitions and Explanation of Terms

Aidmatrix: The Aidmatrix Network is a Web-based program that enables donors to offer goods and services on-line as well as provide overall management of warehouse(s), financial/in-kind donations and unaffiliated volunteers.

Donations Manager: The leader of the County’s donations management program. The Donations Manager (DM) works in the EOC Logistics Section and reports to the Logistics Chief.

Donations Coordination Team: This team consists of both Washington County EOC staff and partner agency representatives who work together to coordinate the management of donations.

FEMA Sequence of Delivery Process: Disaster victims are encouraged to follow the FEMA Sequence of Delivery Process when requesting assistance. The process starts with the victims’ insurance companies, then FEMA assistance, and then other providers as appropriate. The process is designed to avoid duplication and provides a record of what service has already been provided, which is an important reference for agencies providing assistance.

Long-term Recovery Committee: A Long-term Recovery Committee (LTRC) is made up of voluntary agency representatives with clients who still need help after they have finished the FEMA Sequence of Delivery Process and/or have donations to provide. A LTRC, referred to as WCLTRC in this annex, exists to serve Washington County residents.

3.3 Operational Concepts

- Following a disaster, the County will provide a supportive role to volunteer organizations to collect, process, and distribute donations to disaster victims. Volunteer organizations affiliated with the Oregon Voluntary Organizations Active in Disaster (ORVOAD) have donation management experience and are expected to play a primary role. However, experience has shown that voluntary groups can be overwhelmed by the volume of donations and may request County assistance, (e.g., securing free/low cost warehouse space, providing transportation, traffic control, and security).
- Donors offering goods and services as well as funds will be directed to register their offer on-line using Aidmatrix. This program, managed by the State Office of Emergency Management (OEM), serves as a virtual warehouse, enabling volunteer agencies that work with disaster victims to view what is available and to arrange for the delivery of the donations when they are needed. This process avoids the costs of warehousing donations, sometimes for months, until disaster victims are ready to receive them in their new or rebuilt homes.
- An exception to this involves food. All food donation offers will be directed to the Oregon Food Bank rather than Aidmatrix. All food donation offers for animals will be directed to Washington County Animal Services.

- Donors will be encouraged to donate money, versus goods. Donations of cash to voluntary agencies through Aidmatrix or directly to an agency of the donors' choosing, is the preferred donation for disaster relief. Cash donations, managed through voluntary agencies, allow disaster victims the ability to choose replacements for needed items and offer tax incentives to donors. Cash donations also reduce the burden of having to store, sort, manage and transport donated goods.
- Every effort will be made to avoid unsolicited donations. The public, following media coverage of an emergency, will want to help and, without guidance, will often show up expecting to be put to work or drop off what they think is needed by the disaster victims. County PIOs working in a JIC structure will coordinate with the Donations Coordination Team (DCT) to provide comprehensive guidance to the public on how they can help. A JIC PIO will be assigned to the DCT as a liaison.

3.4 Donations Management Program

This plan is activated in anticipation of or following a presidentially-declared disaster for Washington County that includes a declaration for Individual Assistance (IA). Disasters that generate extensive media coverage may result in an activation of this plan before the declaration has been approved. Donations management for lesser disasters will be handled exclusively by voluntary agencies. An IA declaration will trigger activation of the Donations Management Unit in the Logistics Section of the County Emergency Operations Center (EOC).

The Donations Management Unit coordinates the donations management program for the County. This includes internal organizational elements and resources as well as external partner agencies. The Donations Management Unit is led by the Donations Manager (DM) who convenes the Donations Coordination Team (DCT) to determine what is needed to respond to the event.

- Organizational Elements – Internal
 - Donations Manager: The Donations Manager (DM) oversees the donations management program, which includes the Donations Coordination Team and representatives from outside voluntary agencies that have a disaster recovery role as identified in their own organizational directives. The DM reports to the Logistics Section Chief and coordinates with various EOC staff on elements of donations policy, public guidance, operations, and donor recognition.
 - Donations Coordination Team: Upon activation of the Donations Management Unit, the DM convenes the Donations Coordination Team (DCT) to review the situation and determine first steps and elements needed for an ongoing program. DCT staff may be pre-assigned EOC staff or reassigned County staff that possess the skills needed. The DCT's recommendations are submitted to the Logistics Chief who follows protocols for approvals. Some recommendations

may require a decision by the County's Policy Group, especially if the proposed organizational response requires significant County staff/facilities/funds to operate.

- Primary members of the DCT include:
 - Donations Manager – Chair
 - JIC Liaison (creation/distribution of public information)
 - PIC Manager (information dissemination to public)
 - Voluntary agencies liaison (coordination)
 - Donations Unit staff (added as needed)
- An expanded response could add:
 - Facilities representative (facility needs)
 - Sheriff's Office representative (site security concerns)
 - Fleet representative (transportation needs)
 - Public Health representative (medicine donations)
 - Animal Services (animal food/supplies donations)

■ Organizational Resources – Internal

- Joint Information Center (JIC): The JIC Liaison that is appointed to the DCT will keep JIC staff informed of donations management plans. News releases will be distributed through the County PIO listserv and to the media, EOC, DOCs, PIC, ORVOAD, County staff and others as deemed appropriate. The basic message will be to promote cash donations and guide donors to Aidmatrix. If the response is significant and the voluntary agencies are overwhelmed, JIC staff may be directed to offer support to voluntary agencies in getting public information out to better control donations. This would be done to augment their efforts, not interfere or cause redundancy.
- Public Inquiry Center (PIC): The PIC is activated whenever an emergency generates a significant public demand for quick and accurate information and assistance. The PIC is managed by the Logistics Section and provided releasable information by the JIC. When this plan is activated, additional staff will be added to the PIC to answer public questions as to how to donate and what is needed at that time. PIC staff will direct callers to Aidmatrix to register their offers. Internet connection will be available to the PIC staff to use in guiding callers through the process.

In addition to assisting with the donation process, PIC call-takers will also collect caller reports of damage and immediate needs and send the information to the EOC Planning Section for tracking purposes. This information is communicated to the DCT to help them determine types and quantities of donations to request from businesses.

■ Partner Agencies and their Role in this Plan

- Department of Homeland Security/Federal Emergency Management Agency (DHS/FEMA): DHS/FEMA provides support to state governments through the Regional Response Coordination Center (RRCC) or Joint Field Office (JFO) as necessary. Depending on the disaster's impact, this support may include media relations personnel, Web-based donations management software, a national call center, and communications support with key response agencies. DHS/FEMA may also play a role in addressing high-level corporate offers, complex media and/or congressionally driven offers, nationally organized collection drives, and international coordination.
- Oregon Emergency Management (OEM): OEM is authorized to use Aidmatrix to manage donations in Oregon. As soon as it's warranted, OEM will activate Aidmatrix and alert the media, local governments and partner agencies that it is up and running. At that point, the DM will work with the JIC Liaison to get the word out. Aidmatrix is managed by OEM and utilized by ORVOAD agencies and county-level Long-Term Recovery Committees (LTRC) as they work to match available resources to the unmet needs of their clients.
- Oregon Voluntary Organizations Active in Disaster (ORVOAD): This partner organization is made up of many volunteer organizations that have a pre-identified role in disaster response and recovery. Within the VOAD structure, nationwide, Adventist Community Services (ACS) is known as the leader for donations management. Locally, the ACS and other supporting OrVOAD agencies will be instrumental in determining community need, operational capacity and required resources to open and manage a donation warehouse. In most instances, the manager of this warehouse communicates inventory levels and types of donations to ORVOAD member agencies including those serving in county-level LTRCs.

This plan relies on open communication with OrVOAD agencies to determine what resources each can provide in support of donations management. It does not obligate any voluntary agency to provide support.

- Washington County Long-term Recovery Committee: This committee was formed to serve the needs of County residents who have gone through the FEMA Sequence of Delivery Process and still have unmet

needs that interfere with their ability to return to their pre-disaster situation. The WCLTRC is led by volunteer member agencies and receives guidance and support from ORVOAD and Washington County Emergency Management. The WCLTRC activates at the beginning of the recovery phase and on an agency-by-agency basis, provides support in the form of counseling, funding, advocacy, work teams (clean-up/rebuilding), and/or acquiring donations from the ORVOAD Donations Warehouse and/or Aidmatrix. This committee can remain in effect for months or years after an event.

3.5 Donations Management Program Functions

The functions of the Donations Management Program change as staff transition from response to recovery issues. The following includes the primary functions by phase.

- Response Phase – A disaster has occurred, large enough to trigger EOC/DOC activations. A presidential declaration including individual assistance is expected, which triggers activation of the Donations Management Unit. The DM then convenes the DCT to focus on these objectives:
 - Gather incident information regarding the impact to residents' homes and property. Stay current as incident impacts come to light.
 - Work with EOC Planning Section staff to identify donation needs of life-safety supplies and services (e.g., heat, food, water, ice) and develop a plan for receiving and quickly distributing these resources to affected residents.
 - Contact ORVOAD to determine its plan for donations and related timelines of implementation. Continue ongoing communications.
 - Contact OEM to determine when Aidmatrix will be operational. Arrange for PIC staff to receive offered training so they can assist callers.
 - Work with the JIC Liaison to write and distribute key messages, talking points and news releases pertaining to donation needs and procedures.
 - Work with the JIC Liaison to provide releasable donation information to the PIC Manager. Update regularly.
 - Advise the Logistics Chief on donation management issues and make recommendations for increased support as needed.
 - Regularly inform internal staff and partner agencies of plans and actions (e.g., EOC/DOC staff, Washington County staff, cities, adjacent counties, special service districts, voluntary agencies, businesses).

- As appropriate and if approved, offer assistance to ORVOAD agencies in acquiring free/low cost warehouse space to store requested donations that would be managed by voluntary agencies.
- Recovery Phase – Response to the immediate needs of the community have concluded. EOCs/DOCs have closed. Disaster victims are working through the FEMA Sequence of Delivery and are starting to identify needs that won't be met. The Washington County Long-term Recovery Committee has activated and collectively completes these objectives:
 - Contact the FEMA Voluntary Agencies Liaison (VAL) to discuss the number of FEMA applicants in Washington County and how many are likely to have unmet needs after they have completed the FEMA Sequence of Delivery.
 - Receive and file copies of signed release of information forms for each disaster victim that is interviewed.
 - Complete casework including verified loss, assistance already received and the current unmet need(s) of FEMA applicants.
 - Regularly review the list of donations logged on Aidmatrix.
 - Regularly review the inventory lists of donated goods stored in the ORVOAD warehouse.
 - Support transportation arrangements to transport donated materials to disaster victims.
 - Inform county leadership and WCLTRC member agencies of committee efforts, challenges and accomplishments.
 - Establish and maintain a system for records retention which secures casework files and related documentation.

3.6 Expanded Donations Management Response

This annex describes how the County plans to manage donations, but a variety of factors can trigger consideration of additional services and support of ORVOAD efforts. An expanded role would still include steps to coordinate with and support the ORVOAD agencies that lead. The goal is not to duplicate but to provide missing elements that are required to effectively collect, manage and distribute needed donated goods from both private parties and businesses. All possibilities listed need to be carefully evaluated as to their impact on local government resources and approved by the affected jurisdictions/EOC ICs. In some scenarios, the local government Policy Groups will need to approve the additional services. A close working relationship between the DCT and ORVOAD needs to be ongoing as long as these services are provided.

- Donation Drop-off Stations: If ORVOAD agencies determine it would be of value to establish donation drop-off stations in the county and have the

capacity and interest in doing so, the County EOC and cities within the county may commit to providing free/low cost sites. This would be with the understanding that ORVOAD agencies would be responsible for management of the stations and any donations they accept. This option may be considered if Aidmatrix is not available.

- **Service Sites:** Service Sites are generally located in proximity to areas where disaster victims are living. These sites issue ready-to-use goods and other assistance (e.g., food baskets, space heaters to dry out flooded homes, tarps, information/advice). The Service Sites are usually owned and managed by volunteer groups. The sites may also be loaned by businesses or local government. Costs for utilities need to be considered before setting up a site.
- **Transportation Services:** Generally, ORVOAD agencies are able to locate donated transportation services through their own agencies. On occasion, ORVOAD may need assistance in transporting needed donations from a business/corporation to a location (e.g., Service Site) where impacted residents can receive them. For example, a business is willing to donate 200 space heaters to flood victims but is not able to deliver them and ORVOAD does not have a transportation resource immediately available. The County will consider transportation requests from OrVOAD agencies in the interest of expediting service delivery.

4 Organization and Assignment of Responsibilities

4.1 Task Assignments

4.1.1 County Policy Group

- Monitor developing/ongoing events in coordination with the County EOC.
- Establish policy on County resource support of ORVOAD member agencies' efforts to collect, manage and distribute donations of funds, supplies and services to Washington County residents impacted by disaster.
- Coordinate donation policies with the Board of Commissioners, the County IC and the policy groups of impacted local governments.

4.1.2 County Emergency Operations Center (EOC)

- Establish a Donations Coordination Team (DCT) to coordinate with and support ORVOAD agencies throughout the donations management process. (Logistics, PIO/JIC, IC)
- Support the DCT in their efforts to identify needed life-safety supplies/services (e.g, heat, food, water, ice), seek out donations of these resources and then effectively coordinate the distribution of acquired resources to impacted residents. This support will include Planning Section

staff that will collect and document specific resident needs of life-safety supplies and services. (Planning, Logistics, Finance)

- Provide trained PIC personnel to answer public questions about donation opportunities as well as to explain the process for listing donations of funds, supplies and/or services using Aidmatrix. (Logistics, PIO/JIC)
- When approved by the EOC IC, and in some cases the County Policy Group, provide support to ORVOAD agencies in the form of identifying free/low cost facilities for warehousing donations, transporting donated goods and/or providing site security at donation sites. (IC, County Policy Group, Logistics, Operations)

4.1.3 County Health and Human Services Department

4.1.3.1 Animal Services:

- Manage donations designated for the care and feeding of animals impacted by the disaster.

4.1.3.2 Public Health Services:

- Manage donations of medicine and related supplies intended for distribution to residents impacted by the disaster.

4.1.4 County Support Services Department

4.1.4.1 Facilities and Parks Services Division:

- When needed, identify and secure facilities for donations management staff and donated goods.

4.1.4.2 Information Technology Services Division:

- When needed, provide a computer workstation and Internet access to enable PIC staff to utilize the Web-based software program Aidmatrix.
- When needed, provide additional staff (24/7) for technical support during PIC activations to support continued use of Aidmatrix.

4.1.4.3 Fleet Services:

- When needed, arrange transportation services for large donations of goods and equipment.

4.1.7 County Office of Emergency Management

- Support activation of the Washington County Long-term Recovery Committee (LTRC) by contacting member agencies, establishing a meeting schedule, promoting available ORVOAD training (e.g., Casework Management, Re-build Teams), and providing secure storage for casework files.

- Encourage coordination between the WCLTRC and the ORVOAD Unmet Needs Committee to discuss victim needs and identify available resources.

4.1.8 Oregon Voluntary Organizations Active in Disaster (ORVOAD)

- Provide an ORVOAD Liaison to work with the Washington County Donations Coordination Team (DCT) to identify what's needed, promote needs to the public, process donation offers, store donations, and distribute donations to disaster victims when appropriate.
- Provide training and support to the Washington County Long-term Recovery Committee (WCLTRC).

5 Direction and Control

- The Donations Management Unit is only activated if a presidential disaster declaration that includes individual assistance has been made or is expected. At this point, the County EOC has already been activated at a full-scale level and a JIC is established supporting the County PIC with public information.
- Activating the Donations Management Unit
 - Once a presidential disaster declaration that includes individual assistance has been made or is expected to be made, the Logistics Chief makes a recommendation to the IC to activate the Donations Manager position. The DM is then tasked with establishing communications with ORVOAD and OEM to discuss their plans for donations management and to then make recommendations to the Logistics Chief for a coordinated working relationship with them.
 - During the early days of the response phase, the DM establishes the DCT for the initial purpose of identifying the immediate needs of disaster victims. Items related to public safety (e.g., water, ice, food, heat) will be included in an initial request for donations to the business community. All requests for donations will be approved by the Logistics Chief.

After the immediate, life safety needs of disaster victims have been met, the DCT's primary role is to coordinate with and support the voluntary agencies that play lead roles in donations management. In particular, Adventist Community Services is a recognized leader in establishing donation warehouses and processes. The County's role is to work closely with them to learn of their resource challenges and provide support as appropriate.

In support of volunteer agency efforts, County EOC Logistics provides PIC call-takers to take donor calls and to guide them through the process of using Aidmatrix to register their donations of funds, supplies and/or services. The JIC provides a liaison to the DCT to

support the distribution of clear, accurate donor information in support of ORVOAD and OEM efforts.

If additional support is needed (e.g., warehouse facility, security, transportation), the DM will submit a recommendation to the EOC Logistics Chief who will evaluate the request and discuss it with the IC. Some requests (e.g., requests for county funds, staff, equipment) may require a decision at the County Administrator or Policy Group level. An example would be a need for a heated warehouse facility in Washington County that ORVOAD member agencies could use for six months to house donations that will be valuable to disaster victims once they move back into their rebuilt homes.

- Supporting the Long-Term Recovery Committee:

During the long-term recovery phase (usually several months/years following the disaster), direction and control shifts to Washington County Emergency Management with support from the DM. This office provides a liaison to the WCLTRC as they establish processes to review cases of victims and unmet needs. The WCLTRC Liaison reports to the Washington County Emergency Program Manager who keeps the County Administrator informed.

6 Administration and Logistics

6.1 Administration

- For emergencies not requiring activation of the EOC, Washington County Emergency Management staff will be responsible for monitoring the situation and coordinating with ORVOAD member agencies as they evaluate the need and the method of accommodating potential donations.
- For emergencies requiring activation of the EOC and resulting in a presidentially-declared disaster with individual assistance, the EOC DM, working with the DCT, will take actions to acquire donations of supplies and services that are identified as immediate life safety requirements. Efforts will be made to contact the business community to fill these urgent needs.

The DM will ensure that coordination with involved ORVOAD agencies is maintained. When appropriate, the DCT will take actions to encourage the public to use Aidmatrix to report a financial, supply or service donation they'd like to make.

- During recovery, Washington County Emergency Management will support activation of a volunteer-led Long-term Recovery Committee to address the unmet needs of disaster victims. County emergency management staff, along with the DM, will work with ORVOAD to identify volunteer organizations that are willing to join the Washington County LTRC to review cases where the client(s) have received all they can from government sources (e.g., FEMA,

SBA) but still have needs. This LTRC will provide needed resources (e.g., funds, home rebuilds, supplies, counseling) if clients meet WCLTRC guidelines. The LTRC will access donations as needed.

At the conclusion of an event, all donations not distributed will be divided among the responding ORVOAD member agencies.

6.2 Logistics

- **Staffing:** This annex describes a basic donations management structure that would work out of the EOC – a Donations Manager and a Donations Coordination Team, including five to eight positions, each with a different role. In addition, staff in the PIC trained to take donors’ calls and PIOs in the JIC ready to manage public information pertaining to donations are identified in this plan. This staffing level is a starting point. An event of significant scope and impact to people will require the County Administrator to consider reassigning County staff to needed donations management positions.
- **Facilities and Equipment:** All requests for resources, including facilities and equipment, are supported by EOC Logistics. Depending on the magnitude of the event, additional facilities may be needed for office space to support EOC Donations Management staff, for warehouse space to temporarily store donations, and for accommodating additional PIC call-takers to process donation offers. Requests from voluntary agencies for assistance in acquiring a facility to house donations will be considered by the DTC. Facility requests are recommended by the DCT and approved by the Incident Commander.
- **Resources:** Plans and other resources in support of donations management are published separately from this annex and include:
 - Donations Management Unit Checklist (under development)
 - Public Inquiry Center (PIC) Resource Manual (2007)
 - Joint Information Center (JIC) Annex (2007)
 - ORVOAD Bylaws and Membership Roster
 - WCLTRC Guidelines, Charter and Roster (under development)

7 Annex Development and Maintenance

- The Washington County Emergency Management Office is responsible for developing and maintaining this annex with input from the EOC DM following each activation of the Donations Management Unit.
- This annex will be reviewed by all who have an identified role every five years. Changes will be made and the updated annex will be distributed per procedures.

- Copies of the most current Donations Management Annex will be available on the OCEM Website (www.ocem.org), stored in the County EOCs and in the hands of staff with an identified role.
- Individuals, departments, agencies, and voluntary organizations assigned responsibilities in this annex are responsible for developing and maintaining appropriate procedures to carry out those responsibilities.

8 References

- Washington County EOP Basic Plan (2006)
- Oregon Emergency Management Donations Management Plan (2001)
- Oregon Voluntary Organizations Active in Disaster – Group guidelines
- Aidmatrix training materials
- National Response Framework (2008)