

State Planning Standards Checklist for Annex T, Donations Management

Jurisdiction(s): JACKSON COUNTY, INCLUDING CITIES EDNA, GANADO AND LAWARD


Annex Date: 9/3/2019 **Date of most recent change, if any:** _____

(The date which appears on the signature page)

Note: The annex will be considered Deficient if the *italicized* standards are not met.

This Annex shall:	Section/paragraph
I. Authority	
T-1. Identify local, state, and federal legal authorities pertinent to the subject of the annex in addition to those cited in the basic plan.	I.
II. Purpose	
T-2. Include a purpose statement that describes the reason for development of the annex.	II.
III. Explanation of Terms	
T-3. Explain acronyms and define terms used in the annex.	III.
IV. Situation & Assumptions	
<i>T-4. Include a situation statement related to the subject of the annex or refer to the general situation information contained in the Basic Plan.</i>	IV.A
<i>T-5. Include a list of assumptions used in planning for donations management operations during emergency situations.</i>	IV.B
V. Concept of Operations	
<i>T-6. State the objectives of the local donations management program.</i>	V.A.
<i>T-7. Outline the local concept of operations for managing donations in the aftermath of a disaster.</i>	V.B
<i>T-8. Describe the organizational elements of the local donations management program.</i>	V.C.1
<i>T-9. Describe the operational units of the local donations management program and their function</i>	V.C.2
<i>T-10. Include a list of actions by phases of emergency management to be taken to ensure effective donations management during emergency situations.</i>	V.D
VI. Organization & Assignment of Responsibilities	
<i>T-11. Indicate how the donations management function will be organized.</i>	VI.A
<i>T-12. Include a listing of the responsibilities for donations management tasks assigned to individuals, departments, operating units, and other groups.</i>	VI.B
VII. Direction & Control	
<i>T-13. Describe how the donations management program will be directed and coordinated.</i>	VII.A-B
VIII. Readiness Levels	
<i>T-14. Describe actions to be taken at various readiness levels.</i>	VIII

IX. Administration & Support	
T-15. <i>Establish reporting requirements for the donations Management program.</i>	IX.A
T-16. <i>Establish policies on record keeping for the donations management program.</i>	IX.B
T-17. <i>Outline training and exercise requirements relating to the donations management program.</i>	IX.E-F
X. Annex Development & Maintenance	
T-18. Specify the individual(s) by position responsible for developing and maintaining the annex.	X.A
T-19. Make reference to the schedule for review and update of annexes contained in Section X of the Basic Plan	X.B
XI. References	
T-20. List references pertinent to the content of the annex.	XI
Other	
T-21. <i>Include a sample Donation Needs List and Record of Donation Offer.</i>	Appendices 1-2
T-22. <i>Include a Donations Management Operations Guide that:</i> A. <i>Identifies the Donations Coordinator.</i> B. <i>Makes provisions for identifying key donations management operating units and their responsibilities, identifying suitable facilities and required equipment for each unit, and describing how units will operate.</i>	Appendix 4 Tabs A Remaining tabs

FOR LOCAL GOVERNMENT USE		Signature	Date
This Checklist Completed By			9-3-19

FOR DEM USE	Initials	Date
DEM Regional Liaison Officer Review		
DEM Preparedness Section Processing		

ANNEX T

Donations Management

Jurisdiction



**JACKSON COUNTY
INCLUDING THE CITIES OF:
EDNA, GANADO, & LAWARD**

APPROVAL & IMPLEMENTATION

Annex T

Donations Management



Signature

9-3-19

Date



Signature

09-03-19

Date

**ANNEX T
DONATIONS MANAGEMENT**

I. AUTHORITY

- A. See the Basic Plan for general authorities.
- B. Annex T (Donations Management), State of Texas Emergency Management Plan.

II. PURPOSE

The purpose of this annex is to outline the concept of operation, organizational arrangements, and responsibilities for coordinating the efforts of volunteer groups and local government to manage donations of goods and services that may occur in the aftermath of an emergency situation.

III. EXPLANATION OF TERMS

A. Acronyms

ACS	Adventist Community Services
ARC	American Red Cross
CBO	Community-Based (Volunteer) Organization (see VOLAG)
DC	Donations Coordinator
DSG	Donations Steering Group
EOC	Emergency Operations Center
PIO	Public Information Office/Officer
PSA	Public Service Announcement
RSA	Resource Staging Area
TSA	The Salvation Army
VOAD	Voluntary Organizations Active in Disaster
VOLAG	Voluntary Agency (charitable organization that meets the provisions of IRS Code 501(c)(3))

B. Definitions

Donations refer to the following:

1. Cash: Currency, checks, money orders, securities, etc.
2. Goods: Food, water, clothing, equipment, toys, furniture, pharmaceuticals, bedding, cleaning supplies, etc.
3. Volunteers and Services:
 - a. Individuals who are not members of any particular volunteer group (often referred to as “spontaneous,” “emergent,” or “non-affiliated” volunteers).
 - b. Individuals who are members of recognized disaster relief organizations who have undergone formal training by those organizations (i.e., “affiliated” volunteers).

- c. People with specialized training and expertise (e.g., doctors, nurses, medics, search and rescue, firefighting, heavy equipment operators, etc.) who may either be non-affiliated or members of a disaster relief organization.
- d. Teams that provide specialized equipment or capabilities (e.g., urban search and rescue, dog teams, swift water rescue teams, home repair teams, etc.).

IV. SITUATION & ASSUMPTIONS

A. Situation

1. As noted in the Basic Plan, this jurisdiction is at risk from a number of hazards that could threaten public health and safety as well as private and public property. Should a major disaster or a lesser emergency where there is high level of media interest occur, many individuals may want to donate money, goods, and/or services to assist the victims or participate in the recovery process. The amount of donations offered could be sizable, and we could face extreme difficulties in receiving, storing, securing, sorting, transporting, accounting for, and distributing the donations to the disaster victims and supervising volunteer workers desiring to assist in the effort.
2. Jackson County does not wish to operate a system to collect, process, and distribute donations to disaster victims. Such a system is best operated by community-based organizations (CBOs) and other voluntary agencies (VOLAGs) who have successfully handled donations in the past. Local government does, however, desire to coordinate its donation management efforts with volunteer organizations and agencies.
3. According to Chapter 418.074 of the Texas Government Code, our County Judge may accept a donation (in the form of a gift, grant, or loan) on behalf of the County for purposes of emergency services or disaster recovery. In turn, our County may use all the services, equipment, supplies, materials, and funds to the full extent authorized by the agreement under which they are received.

B. Assumptions

1. Should a major emergency or disaster occur, donations may be given/delivered to our County whether or not they are requested. In large quantities, such donations may overwhelm the capability of the local community to handle and distribute them.
2. In a catastrophic disaster affecting the jurisdiction, local government and local volunteer groups and agencies may be adversely affected and may not be able to cope with a sizable flow of donations.
3. Donated goods may be offered to local volunteer groups or simply delivered to local government. Donations of cash for disaster victims may be made to local government.
4. Many individuals donate goods that are not needed by disaster victims or offer services that are not needed in the recovery process. Receiving and sorting unneeded goods or hosting volunteers who do not have needed skills wastes valuable resources; disposing of large quantities of unneeded goods can be a lengthy and very costly process.

5. In some cases, the amount of donations received by a community may relate more to the media attention the emergency situation receives than the magnitude of the disaster or the number of victims.
6. The problem of unneeded donations can be reduced, but not eliminated, by developing and maintaining a current list of disaster needs, screening donation offers, and providing information to potential donors through the media on current needs and those items and services that are not required.
7. Most personal donations are given little expectation of return other than the personal satisfaction of giving and perhaps some acknowledgment of thanks. However, some donations may be unusable, have "strings attached," or not really be donations at all. They may:
 - a. Be given with an expectation of some sort of repayment, publicity, or a tax write-off.
 - b. Be items that are out-of-date (such as expired foodstuffs or pharmaceuticals) unusable (broken furniture; dirty or torn clothing) or unsuitable (food that requires refrigeration, winter coats in August).
 - c. Be volunteer services that do not meet the announced or advertised expectations or capabilities; skilled trades that are not properly licensed or certified.
 - d. Be provided illegally as a ruse in a fraudulent process to obtain money from disaster victims.
 - e. Be offered at a "discount" to disaster victims, with any real savings being minimal or nonexistent.
 - f. Be offered in limited quantity as a deception to simply show an "association" with government or disaster relief as a basis for future advertising or publicity.
8. Donated goods may arrive in the local area without warning, day or night. Delivery drivers will want to know where they should deliver their load and who will unload it. They typically want their cargo off-loaded quickly so they can minimize down-time.
9. Donations will frequently arrive unsorted and with minimal packaging and markings. Donations may be packed in boxes, crates, barrels, or garbage bags; some items may be in bins or on pallets. When such goods are received, they must typically be sorted, repackaged and labeled, temporarily stored, and then transported to distribution points to be picked up by disaster victims.
10. Donors may want to:
 - a. Know what is needed in the local area -- cash, goods, and/or services.
 - b. Know how they should transport their donation to the local area, or if there is someone who can transport it for them.

- c. Start a “drive for donations” to help disaster victims, but have no knowledge of what to do and how to do it.
- d. Earmark their donation for a specific local group or organization, such as a church, fraternal society, or social service agency, or want to know to who, specifically, received their donation.
- e. Have their donation received by a local official and/or receive a letter of appreciation or public recognition.
- f. Want to be fed and provided with lodging if they are providing volunteer services.

11. Disaster victims may:

- a. Desire immediate access to donations before they are sorted and ready to be disseminated at appropriate distribution points.
- b. Believe that the donations have not been or are not being distributed fairly if they do not have information on the process of distributing donations.
- c. May have unmet needs which can be satisfied by additional donations.

V. CONCEPT OF OPERATIONS

A. Objectives

The objectives of our donations management program are to:

- 1. Determine the needs of disaster victims and inform potential donors of those needs through the media and a variety of other means.
- 2. Receive, process, and distribute goods and cash donations to victims that can be used to recover from a disaster.
- 3. Accept offers of volunteers and donated services that will contribute to the recovery process.
- 4. Discourage the donations of goods and services that are not needed, so that such donations do not in themselves become a major problem.

B. Operational Concepts

- 1. Jackson County does not wish to operate a system to collect, process, and distribute donations to disaster victims. Such a system is best operated by community-based organizations and other volunteer organizations that have successfully handled donations in the past. However, experience has shown that volunteer groups can be overwhelmed by the scale of donations and need certain government assistance (such as traffic control, security, and help in identifying facilities to receive, sort, and distribute donated goods); additionally, large numbers of donations may be sent to the local

government itself. Hence, local government desires to coordinate donation management efforts with volunteer organizations and agencies.

2. Recognized local and national charities [e.g., community-based organizations (CBOs) and the voluntary (disaster relief) agencies (VOLAGs)] have been accepting, handling, and distributing donations for many years. These CBOs and VOLAGs are skilled in the donations management process, and they should be the first recourse for collecting and managing donations after a major emergency or catastrophic disaster. Donors outside the local area should be encouraged to work through recognized community, state, or national social service organizations or voluntary human resource providers in the community in which they live. These organizations are capable of receiving donations in areas across the State or nation and then earmarking assistance for a particular disaster.
3. Donations of cash to CBOs and VOLAGs for disaster relief allows those organizations to purchase the specific items needed by disaster victims or provide vouchers to disaster victims so that they can replace clothing and essential personal property with items of their own choosing. Cash donations also reduce the tasks of transporting, sorting, and distributing donated goods. Therefore, cash is generally the preferred donation for disaster relief.

C. Donations Management Program

The donations management program for [County/City] is composed of several organizational elements and several operating units that are activated as needed at a level suitable for the anticipated workload. The organizational elements include the Donations Coordinator, Donations Steering Group, and the Unmet Needs Committee. The operating units include: a Donations Operations Office, a Resource Staging Area, a Phone Bank, one or more Distribution Points, and a Volunteer Center.

1. Organizational Elements

- a. Donations Coordinator (DC). A Donations Coordinator shall coordinate the donation management efforts of volunteer groups and local government. The Donations Coordinator should be appointed in writing by the [County Judge/Mayor] when this annex is initially published and a replacement should be appointed in writing whenever there is a vacancy in this position. See Appendix 4, Tab A, for a sample of the DC appointment letter.
- b. Key Donations Management Personnel. Key donations management personnel should, to the extent feasible, be identified in advance so that they can receive training and assist in the development of operating procedures. In addition to the Donations Coordinator, key personnel include the individuals who will supervise operation of the Resource Staging Area, Phone Bank, Volunteer Center, and Distribution Point(s), as well as the Donations Financial Manager. See Appendix 4, Tab C, for the list of key donations management personnel.
- c. Donations Steering Group (DSG). The DSG provides policy guidance and general direction for the donations program. Composed of representatives of local volunteer groups and appropriate government officials, it meets periodically to plan for donation management operations. Group members should be selected prior to a

disaster, but it may be desirable to update and expand membership once a disaster occurs. Oftentimes the core of the Group is an existing association of local volunteer agencies such as the Voluntary Organizations Active in Disaster (VOAD). The Donations Coordinator is responsible for organizing the DSG and normally chairs the Group. See Appendix 4, Tab B for the DSG membership roster. When a disaster has occurred, the DSG should meet regularly to address policy issues and coordinate the solution to major challenges.

- d. Unmet Needs Committee. The function of the Unmet Needs Committee is to assist disaster victims who need assistance that local government has been unable to provide. The DC is expected to assist in forming the Committee as soon as practical after a disaster occurs. The Committee may continue to operate for an extended period. The Unmet Needs Committee should consist of representatives from organizations that have provided or can provide money, manpower, or materials to assist in disaster relief. Members would typically include:
 - 1) Representatives of local volunteer organizations.
 - 2) Representatives of the local ministerial alliance.
 - 3) Representatives of corporations that have donated money, staff, or goods for disaster relief.
 - 4) Other interested parties that have donated to disaster relief.

Although the DC should assist in forming the Unmet Needs Committee, its chair should be elected by the members and preferably be a highly regarded and well known local citizen who does not have other major commitments. As this Committee will decide which individuals receive supplemental aid, it is generally inappropriate for government officials to serve as members of this Committee. If they do, they should play a non-voting advisory or support role only. See Appendix 4, Tab D, for Unmet Needs Committee membership.

2. Operating Units

All of the operating units listed below are established after a disaster has occurred. To facilitate rapid activation of the units, suitable local facilities for each unit should be identified in pre-emergency preparedness planning; see Appendix 4, Tab 1. Some of the operating units listed below may be collocated if suitable facilities are available; for example, the Volunteer Center may be collocated with the Resource Staging Area, if a facility that provides sufficient warehouse and office space is available. In coordinating use of facilities, it is important that those providing facilities understand that some of these facilities may need to continue operations for an extended period – possibly several months. All of these facilities will be largely staffed by volunteers.

- a. The Donations Operations Office.
 - 1) The Donations Operations Office coordinates operation of the donations management program in the aftermath of a disaster; it further:
 - a) Maintains a Current Needs List that identifies donations that are needed and donations that are not needed. (See Appendix 1 for a sample of a Current Donations Needs List.)

- b) Maintains a record of the following, as appropriate:
 - (1) Phone responses and referrals.
 - (2) Cash donations received and distributed.
 - (3) Donated goods received and distributed.
 - (4) Volunteer workers utilized and tasks accomplished.
 - c) Handles correspondence related to the donations management program.
 - d) Ensures an appropriate accounting and disbursing system is established for any cash donations received (see Appendix 4, Tab J).
 - e) Works closely with the Public Information Officer (PIO) to ensure donation needs, information on the availability of donated goods, and pertinent information on the operation of the donations management program is provided to the media for dissemination to the public.
- 2) See Appendix 4, Tab E, for information on the operation of the Donations Operations Office and the facilities, equipment, and staffing required.
- b. Phone Bank
- 1) A Phone Bank is normally established to receive and respond to offers of donations and disseminate other disaster-related information. Depending on the goods or services offered and the current local situation, the Phone Bank may refer some donors to other agencies that may be better equipped to handle their donations. The Phone Bank may also be used to provide disaster-related information to callers.
 - 2) Donation offers received by phone for goods and services on the Current Needs List will normally be recorded on a Record of Donation Offer, which will be provided to the Donations Operations Office for follow-up action. See Appendix 2 for an example of the Donation Offer Record.
 - 3) The Phone Bank should work closely with the County Emergency Operations Center (EOC) to advise on items needed and not needed; to obtain official, updated disaster relief information for rumor control and victim assistance referrals; to provide data for government situation reports; etc.
 - 4) See Appendix 4, Tab G, for information on the operation of the Phone Bank and the facilities, equipment, and staffing required.
- c. Resource Staging Area (RSA)
- 1) An RSA may be established to receive, sort, organize, repackage if necessary, and temporarily store donated and other goods and then transport them to Distribution Points where victims can pick them up.
 - 2) It is normally located outside of the disaster area and is operated by volunteer workers. Because of their expertise in warehouse management, the Adventist

