After Action Review for Volunteer Management Table Top Hub Exercise
November 14, 2015

This Table Top was intended to send some volunteers to the practice hubs to see how they assigned them, managed them, thought about their safety and managed them over time, especially if they had a reusable resource to share.

Each hub table had 10 scenarios to work through, and each hub was also given 2 injects, one from the city and one from another hub. After 45 minutes, the exercise was stopped to debrief the room on what was working and what wasn't working. The exercise was reset and the hub tables all got 10 more scenarios (which were identical, but not everyone got through the first 10, so while there was some repetition, there were also new scenarios put into play.) The hub tables worked again for another 45 minutes, summarized their learning and debriefed the room on their best ideas or observations.

Top points

- Hubs should consider a Volunteer Coordinator position or function (responsibilities need to be defined.)
- A Volunteer Intake form could expedite incoming volunteers- with skill check boxes and place to write experience that the volunteer can fill out themselves
- Hubs need to think about a system to manage the NEED/Resources cards with the Volunteer assigned. (see below for an more detailed description)
- This type of table top exercise worked really well to understand the issues.

Collected Observations

This can get complicated quickly, need to make sure people are managed well from the start of a hub opening up.

When the Information Organizer was giving assignments to volunteers, it was creating bottlenecks. If there is a Volunteer Coordinator, they need to work very closely with the Information Organizer. But even then, there could be bottlenecks, so could consider having two Volunteer Coordinators, one to make the decisions and one to do the dispatching.

There were bottlenecks, both at Greeter and at Message Taker. But at Message Taker, you have to keep things slow and steady to make sure a good job is done.

Make sure the volunteer is comfortable with the assignment and wants to do it.

A new "Volunteer" intake form was discussed. Either way, the assignment of each volunteer should be captured, either on the request form (who, when helped on responding to the request) or on the separate form

A Volunteer form could be created that has check boxes of skills, so that volunteers can fill them out themselves, relieving the bulk of the burden on the message takers

Important to fill out the forms so that assignment information was quickly and clearly visible, for example a few summary words in black felt tip could be added right on the form to give that 'quick check" visibility.

Handwriting on the forms continues to be a problem, use block printing.

If there is just a single form, you can use color coding to make things easily visible, for example a Red highlighter to show incidents, a Blue highlighter to show volunteers.   Also could use color coded index cards as subject headings.

Needs Forms should be date and time stamped when the need was met, and should be pulled from the boards when met.

When requests and volunteers are matched, those forms should be kept together, so you know what was done about the request and who did it, or to track which volunteer is still responding.

One suggestion was to create a log for keeping track of volunteers.
An “assignment card” was suggested to be given to the volunteer, which would contain the place to go, the task to perform and what to do when done, along with basic safety information. Be sure and tell the volunteer how to check back in after the task is completed (if you want them to)

A system that could be set up is one of “check in, check out”. This is where each volunteer is assigned a small tag. When they leave, a duplicate tag is hung on a board to show that the volunteer is out on a task. When the volunteer is done and returns to the hub, the chit/tag is removed. This is an easy visual system.

We may want to send small Family Service Radios out with people with critical skills, so that we can stay in touch with them.

Practicing with Boy Scout Troop 827 revealed how valuable the Scouts (of all stripes) can be. At the end, we have listed all the skills the scouts told us they could contribute. For even more information, their Emergency Preparedness Badge requirements are appended.

Input from David Baum

Our table really made some progress! I’m finally confident I know how to accomplish that central and elusive task: “Matching resources with needs.” Here are the details of what our table came up with:

The form for volunteers (or any “resource”) is different than a message form. When a person is looking at the board trying to match resources with needs, he/she must be able to see at a glance what the volunteer can offer. This means job title and/or skill set is MOST PROMINENT. I used index cards and labeled them “CERT” or “Doctor” or “Pastor” or “Boy Scout”, followed by “first aid”, “counseling skills”, “bicycle”, etc. to show what comes with them.

The same applies to needs, which showed up as “situations” or “incidents.” I want to see “Building Collapse” or “Gas Leak - Evacuation”, or “Children’s shelter wants counsellor” in big letters. Then I can judge quickly what kind of help they need, and quickly read the volunteer cards to see if we have something.

We discovered that “assigning” a volunteer to a situation is an actual step that needs to happen explicitly. We were having success putting the volunteer card(s) physically below the situation card on the wall. We realized we need to give the volunteer a separate piece of paper with the situation address on it, at least, so there is some copying that must happen when the volunteer is assigned.

We realized we can track the volunteer’s movement by recording their activities at the bottom of their card with a timestamp. “0945 - Checkin. 1015 - Assigned to 3605 Dayton. 1130 - Returned to Hub.” Etc. The key is that there is one card per volunteer, and that card – taped to the wall or slotted in a "pocket chart" – shows their status: assigned to a situation or "in the pool" waiting to be assigned.

We figured out some stuff about staffing and procedure. We had success with one person being responsible for needs or "situations" and a different person responsible for volunteers or "resources." The Situation person puts the need cards on the board. The Volunteer person organizes the "pool" of volunteer cards, separately. Then a third person (a "Dispatcher"?) decides to assign a volunteer from the pool to a situation. The Dispatcher: 1) takes the volunteer card from the pool, 2) makes a timestamp entry on it, and 3) puts it with the situation card on the board. Also, at the same time, the Dispatcher creates an "Assignment Card" by copying the situation address onto a different card to give to the volunteer. (That card has safety info on it, too.)

This was actually working in your second exercise! People felt they understood what was happening and we did not feel overwhelmed by messages. I'm confident I can drill this and train for it with the PhinneyWood people. There are details to work out, of course, but the framework is good, I think.

So thank you for creating the environment where this kind of learning and development can happen! I'll probably be writing up procedures and creating some forms (when time allows), and I'll send them on. Please let me know if I can answer any questions or provide more information.

Larger considerations

After the exercise, as these notes were being compiled, one area not addressed was the larger implications of managing volunteers. We know that we may struggle to have enough people to perform the basic tasks of communicating information so people can help people. Active management of volunteers will need dedicated resources that we may not get. At some point, we should establish a "bare minimum" of best practices, so that volunteers can safely be put to work as we do our other tasks. This exercise gave us a great start towards a well organized set of practices, we just have to decide how much active "management" is part of our mission.

Tasks listed by Boy Scouts

Send them out on bikes to check things, gather information
They have first aid supplies that they can bring
They have troop stored camping gear for scout weekends that might be of use
Some scouts have food stores (E-prep kits)
Some scouts have light medical skills.
Younger scouts can be runners
Can help set up with shelter tarps, use knot skills.
Scouts can help control crowds, or direct people to the right places
Scouts can help pass out food and water if supplies are dropped off.
Scouts have knowledge of tools.
Can patrol the area to help keep it clean

More info from the Adult Troop Leader

The Senior Patrol Leader, Assistant Patrol Leader and Patrol Leader are all leadership positions and will have the best organizational skills.
Most scouts have first aid training and would be a capable "nurse" if there is a doctor volunteer.
They also have cooking skills, and could help where food is being salvaged.

Note: The Girls Scouts also have a First Aid Badge, but no Emergency Preparedness Badge.

Requirements for the Emergency Preparedness merit badge (Boy Scouts):

1. Earn the First Aid Merit Badge.
2. Do the following:
    a. Discuss with your counselor the aspects of emergency preparedness:
        1. Prepare for emergency situations
        2. Respond to emergency situations
        3. Recover from emergency situations
        4. Mitigate and prevent emergency situations

        Include in your discussion the kinds of questions that are important to ask yourself as you consider each of these.

    b. Make a chart that demonstrates your understanding of each of the four aspects of emergency preparedness in requirement 2a (prepare, respond, recover, mitigate, and prevent) with regard to 10 of the situations listed below. **You must use situations 1, 2, 3, 4, and 5 below in boldface** but you may choose any other five listed here for a total of 10 situations. Discuss this chart with your counselor.
        1. **Home kitchen fire**
        2. **Home basement/storage room/garage fire**
        3. **Explosion in the home**
        4. **Automobile accident**
        5. **Food-borne disease (food poisoning)**
        6. Fire or explosion in a public place
        7. Vehicle stalled in the desert
        8. Vehicle trapped in a blizzard
        9. Flash flooding in town or the country
        10. Mountain/backcountry accident
        11. Boating accident
        12. Gas leak in a home or building
        13. Tornado or hurricane
        14. Major flood
        15. Nuclear power plant emergency
        16. Avalanche (snowslide or rockslide)
        17. Violence in a public place
    c. Meet with and teach your family how to get or build a kit, make a plan, and be informed for the situations on the chart you created for requirement 2b. Complete a family plan. Then meet with your counselor and report on your family meeting, discuss their responses, and share your family plan.
3. Show how you could safely save a person from the following:
    a. Touching a live household electric wire
    b. A room filled with carbon monoxide
    c. Clothes on fire
    d. Drowning using nonswimming rescues (including accidents on ice)
4. Show three ways of attracting and communicating with rescue planes/aircraft.
5. With another person, show a good way to transport an injured person out of a remote and/or rugged area, conserving the energy of rescuers while ensuring the well-being and protection of the injured person.
6. Do the following:
    a. Tell the things a group of Scouts should be prepared to do, the training they need, and the safety precautions they should take for the following emergency services:
        1. Crowd and traffic control

        2. Messenger service and communication
        3. Collection and distribution services
        4. Group feeding, shelter, and sanitation
    b. Identify the government or community agencies that normally handle and prepare for the emergency services listed under 6a, and explain to your counselor how a group of Scouts could volunteer to help in the event of these types of emergencies.
    c. Find out who is your community's emergency management director and learn what this person does to prepare for, respond to, recover from, and mitigate and prevent emergency situations in your community. Discuss this information with your counselor and apply what you discover to the chart you created for requirement 2b.
7. Take part in an emergency service project, either a real one or a practice drill, with a Scouting unit or a community agency.
8. Do the following:
    a. Prepare a written plan for mobilizing your troop when needed to do emergency service. If there is already a plan, explain it. Tell your part in making it work.
    b. Take part in at least one troop mobilization. Before the exercise, describe your part to your counselor. Afterward, conduct an "after-action" lesson, discussing what you learned during the exercise that required changes or adjustments to the plan.
    c. Prepare a personal emergency service pack for a mobilization call. Prepare a family kit (suitcase or waterproof box) for use by your family in case an emergency evacuation is needed. Explain the needs and uses of the contents.
9. Do ONE of the following:
    a. Using a safety checklist approved by your counselor, inspect your home for potential hazards. Explain the hazards you find and how they can be corrected.
    b. Review or develop a plan of escape for your family in case of fire in your home.
    c. Develop an accident prevention program for five family activities outside the home (such as taking a picnic or seeing a movie) that includes an analysis of possible hazards, a proposed plan to correct those hazards, and the reasons for the corrections you propose.