

**PLANNING GUIDELINES FOR  
CONVERGENT VOLUNTEER  
MANAGEMENT**

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# PLANNING GUIDELINES FOR CONVERGENT VOLUNTEER MANAGEMENT

## Table of Contents

Introduction and General Policy Issues.....	2
Convergent Volunteer Management Planning.....	4
1) Initial Volunteer Intake.....	4
2) Training.....	7
3) Volunteer Supervision, Assignments, Management, and Demobilization.....	9
4) Insurance and Liability.....	13
5) Program Funding and Authorities.....	14

### APPENDICES

1. Project Workgroup.....	15
2. Resources Used in the Development of these Guidelines.....	16
3. Sample Volunteer Registration Forms.....	17
4. Sample Press Release.....	19
5. Volunteer Operations Center Guidance.....	20
6. Volunteer Interview Guide.....	26
7. Guidelines on Personal Protective Equipment.....	27
8. Non-oil Recovery Work Areas for Volunteers.....	28
9. Ways to Recognize and Honor Volunteers.....	30
10. Sample Volunteer Timesheet.....	31
11. Sample Volunteer Request Form.....	32

## A. INTRODUCTION AND GENERAL POLICY ISSUES

Since maintaining databases of trained volunteers is generally considered time-consuming and neither cost effective nor entirely reliable for planning purposes, these guidelines focus on management of volunteers who self-identify only when an oil spill incident occurs, hereafter referred to as "convergent volunteers."

Local volunteers can play an important role in oil spill response, providing a wealth of knowledge pertaining to wildlife populations, currents, tides and other environmental phenomena. During a spill emergency, it is possible that large numbers of local community members will arrive on scene, eager to participate in response activities. Providing adequate management in the form of timely training and professional supervision, as well as ensuring their safety, maintaining records, and following up with recognition are challenges best met with prior planning. Indeed, successfully meeting such challenges sends a positive message to the public.

These volunteer management planning guidelines have been developed by a Work Group sponsored by the Pacific States/British Columbia Oil Spill Task Force (see Appendix 1) for the benefit of Area Committees endeavoring to develop Convergent Volunteer Management Plans. They are not intended to be used as a template, since statutes and regulations governing volunteer management vary among states or provinces. Instead, they should serve as guidelines for topics/issues/strategies to consider as the Convergent Volunteer Management component of an Area Plan is developed. These Guidelines draw heavily on work already done by other experts (See Appendix 2, Resources) and attempt to present that information in a logical way. Also please note, these *Planning Guidelines for Convergent Volunteer Management* are intended for oil spills only; adaptation to other emergency response situations is possible, but is not addressed by these guidelines.

The possible use of volunteers is recognized in 40 CFR 300 (the National Oil and Hazardous Substances Pollution Contingency Plan - NCP), part 185 (c) as follows: *ACPs shall establish procedures to allow for well organized, worthwhile, and safe use of volunteers, including compliance with 300.150 regarding worker health and safety. ACPs should provide for the direction of volunteers by the OSC/RPM or by other federal, state, or local officials knowledgeable in contingency operations and capable of providing leadership. ACPs also should identify specific areas in which volunteers can be used, such as beach surveillance, logistical support, and bird and wildlife treatment.* The definitions section of the NCP includes "volunteer" as follows: **Volunteer** means any individual accepted to perform services by the lead agency which has authority to accept volunteer services (examples: See 16 U.S.C. 742f(c)). A volunteer is subject to the provisions of the authorizing statute and the NCP.

Volunteer Management Plans should acknowledge that there are two kinds of convergent volunteers: unpaid (also referred to as "true volunteers") and paid, since responders have an option to hire convergent volunteers, thus putting them into the workforce. This may be the only possible option based on local liability regulations. Many of the same planning issues identified in

these guidelines could apply to paid as well as unpaid volunteers. It is necessary to communicate clearly with convergent volunteers and the public regarding which option is in play.

If convergent volunteers are unpaid, however, that does not mean that there are no costs involved. Paid professionals will be needed to process, train, and supervise volunteers, space and equipment will also be required for these tasks, food, housing, and transportation may be needed, and safety equipment may also be required for volunteers. It should also be understood that the Responsible Party (RP) will provide reimbursement for all costs associated with the Convergent Volunteer Management Program, including insurance costs and claims.

Regarding reimbursements from the National Pollution Funds Center (NPFC) of the U.S. Coast Guard for expenses related to volunteer use during spill response, the NPFC has indicated that a decision memo from the FOOSC / IC requesting the use of a specific number of volunteers and specifying their work assignments will be required. Training needs should also be specified in the memo. In addition, volunteers must be supervised by local, state, or federal agency representatives. The NPFC further notes that, if an RP is not available, NPFC can reimburse only for PPE, not for food, mileage, tolls, housing, or insurance.

Area Committees should pre-identify local volunteer coordinators, volunteer management organizations, and incident Volunteer Coordinators in order to ensure that all plans are in place and compatible, and that all persons working with convergent volunteers are appropriately trained. Area Committees should also pre-identify the types of jobs that volunteers will be used for, and develop those job descriptions in advance.

It is the responsibility of the Unified Command to make the decision to use convergent volunteers. Until the level of local interest in volunteering is determined, the Volunteer Coordinator should distribute information to the public indicating that - although the need for volunteers is not yet determined - interested persons can contact a toll-free number or access a website to pre-register while also receiving information on the spill incident. This website or phone number should provide information on the kinds of jobs that volunteers might do, as well as the skills/training required for certain assignments. It is advised that information on how to report oiled shorelines or wildlife also be accommodated by this phone/web system.

The Volunteer Coordinator should advise the UC and Planning Section regarding the level of response and interest. Unified Command will then coordinate this information with the response needs of the spill incident in making their decision.

The decision to use convergent volunteers should be made by Unified Command with the understanding that unpaid, convergent volunteers will supplement, not replace, the work of professional responders hired by the RP. In addition, the decision should be compatible with the Area Plan component for Convergent Volunteer Management, as based on the following guidelines.

## B. CONVERGENT VOLUNTEER MANAGEMENT PLANNING

### 1. Initial Volunteer Intake

There are various models for managing convergent volunteers. For instance, the California Volunteer Guidance Manual outlines planning and response functions for a State Volunteer Coordinator, a Local Volunteer Coordinator, and an Area Volunteer Coordinator.

- a) A city, county, or state government agency (e.g., emergency management offices), and/or a non-profit (NGO) (e.g., the Red Cross) could be pre-identified and pre-approved (by a state or province) to provide all Volunteer Intake and Management services as described below. These would be known as Local Volunteer Coordinators (LVCs).
  1. Pre-approved contracts and grants to organizations/agencies may be an appropriate means of guaranteeing that adequate services will be available.
  2. In the case of an established oiled wildlife care program, the groups involved in such a program may provide volunteer intake/training/supervision, etc.
- b) Another paradigm may be for pre-arranged non-profit organizations or local emergency management agencies to provide only initial intake and screening, while an Incident Volunteer Coordinator (IVC) appointed by the Incident Commander/Unified Command would oversee volunteer training, supervision, and demobilization functions described below.
- c) Or, as a 3<sup>rd</sup> option, the Incident Volunteer Coordinator could manage all aspects of the convergent volunteer program, from intake to demobilization, as listed in section d) below.
  1. Volunteer Coordinators should be pre-identified, appropriately trained, and paid if required by liability regulations for the affected jurisdiction.
  2. According to the 2006 U.S. Coast Guard Incident Management Handbook, page 19-9, the Volunteer Coordinator (VC) reports to the Resource Unit Leader in the Planning Section. (NOTE: In the Kodiak, Alaska Subarea Plan, the VC reports to the Logistics Section Chief; each Area Committee should decide to which ICS section the VC will be assigned).
  3. The Incident Volunteer Coordinator could coordinate with the Operations Section Chief and the Planning Section Chief to develop job descriptions and a list of volunteer positions/capabilities.
  4. Once a list of volunteers and their respective capabilities are developed, the IVC will advertise these capabilities to the Unified Command & General Staff elements.
- d) Whichever structure is used, volunteer management functions may include but are not limited to the following:
  1. To provide a point of contact for all volunteers as well as for all units/agencies needing volunteers.
  2. To establish and manage the Volunteer Operations Center (VOC) to provide recruitment, registration, orientation, training, assignments, and arrangements for supervision.

3. To establish a communication system, including toll-free phone numbers, fax lines and fax machines, phones, a website, and a link to the Command Center. Recruitment of an Amateur Radio Operator should be considered for remote locations.
4. To coordinate with the Public Information Officer (or Joint Information Center) to provide notification to the media regarding types of volunteer jobs available and procedures for volunteering, including a toll free phone number or website where more information is available and/or where volunteers can register. It is essential to coordinate dissemination of the toll-free telephone numbers to the public through the UC's JIC and local PIOs to reduce confusion and ensure consistency of information. When the VOC is activated, the UC's JIC and local PIOs may want to issue a press release with information regarding volunteers. See Sample Press Release (Appendix 4). The press release should include:
  - A. Updated information on the situation
  - B. Status on the need for volunteers
  - C. Contact information for volunteers
  - D. General information warning the public to stay away from the spill site and oiled wildlife because of exposure to hazardous substances.
  - E. Directions to the public regarding how to report oiled animals.
  - F. If convergent volunteers are not needed at time of activation, the press release should direct potential volunteers to the website or phone number where they can register in case they are needed in the future.

**NOTE: All press releases must be approved through the UC before being released to the public.**
5. To activate training contractors as needed
6. To train, assign, and supervise staff to work in the VOC. Conduct daily situation briefings for VOC staff.
7. To activate pre-trained volunteers, if available
8. To provide safety training as necessary for all volunteers to ensure they are properly trained and equipped and in compliance with federal, state and local safety regulations.
9. To coordinate with Unified Command via the Resources Unit Leader (or Logistics Chief, if so designated in the Area Plan) to provide volunteers as needed and to coordinate referrals and assignments.
10. To coordinate with the Logistics Section for food, transportation, and shelter as needed for volunteers.
11. To coordinate with the Logistics Section for equipment, materials, and supplies as needed.
12. To maintain records of volunteers, training and certification, hours worked, and their assigned activities. A Unit Activity Log (ICS Form 214) for the VOC should be considered.
13. To provide volunteer recognition after the spill response is concluded.

e) Whether using a public or non-profit agency or a Volunteer Coordinator directly appointed by Unified Command, a Volunteer Operations Center (VOC) should be established.

1. The VOC should be the location for initial screening, skill and training identification, registration, orientation, training, and assignments.
2. It is recommended that such facilities be pre-identified in the Area Plans for various locations in the planning area where spill events are likely.
3. VOC location criteria as recommended in the California Volunteer Guidance Manual recommends that "the location of the VOC should be close enough to the focus of activity to be efficient without interfering with site operations. The following should be taken into consideration:
  - A. Estimated number of volunteers expected
  - B. Types of assignments necessary
  - C. Locations and times needed
  - D. Parking
  - E. Access
  - F. Adequate space for all functions
  - G. Adequate sanitary facilities"
4. Please reference Appendix 5 for detailed recommendations on VOC attributes, establishment and set-up, equipment and supplies, staffing job descriptions, and station checklists.
5. Unified Command may decide to establish more than one VOC if the magnitude of the spill response justifies doing so.

f) A registration protocol should be in place by phone, website, or in person.

1. Initial screening of volunteers should determine at least the following:
  - A. Age 18 or older;
  - B. In good health, not pregnant, and not using any medications that can affect performance; and
  - C. Skills appropriate to possible assignments.
2. PLEASE NOTE: Regarding 1.B above, conducting a physical is considered too cumbersome. Each planning jurisdiction will need to determine the legality of asking for personal health information. Experienced volunteer managers recommend asking if there are any medical issues that might prevent the volunteer from doing the work, including lifting 25-35 lbs. Observations regarding a volunteer's health/appearance, as made during the interview, may warrant assignments to low-impact jobs.
3. Registration should include assigning a "mission number." That number allows for volunteer tracking and may qualify them for insurance coverage.
4. Photo identification badges should be issued to all volunteers.
5. Volunteers should be required to sign waivers which clearly state that they understand that they will not be paid for their services (unless they will be taken in as paid employees).
6. See sample Volunteer Registration Forms in Appendix 3.
7. Please reference Appendix 6, Volunteer Interview Guide.

g) A database should be maintained which identifies which training volunteers have completed, additional skills and certifications (Hazwoper, wildlife hazing, etc.), and individual preferences and availability. This database can also be used to log their assignments and hours worked. Each prospective volunteer should be asked at the beginning of their interview if they would object to having their data saved in a volunteer database. If they do not wish to have their information included in a database for future incident notification, it should be deleted following demobilization.

h) One key objective of providing early and efficient information to the public on how they can become involved as volunteers is to protect them from possible safety risks should they try to remove oil or oiled wildlife from shorelines without the benefit of training and personal protection equipment. The public may also increase wildlife impacts by frightening oiled wildlife away from shorelines where they seek to escape the oil or cold waters.

1. In this regard, Area Committees are encouraged to plan for adequate security at oiled shorelines. Security personnel should also provide the public with brochures or other forms of information on how they can be involved as volunteers.

## 2. Training

a) Convergent volunteers may require training, including hazardous materials training as required by U.S./Canadian OSHA and by state/provincial "OSHAs".

1. Area Planning Committees should identify the state/provincial and federal OSHA requirements/standards in each jurisdiction which apply to volunteer spill response activities

b) Training sessions for volunteers may include, but are not limited to:

1. An overview and update on the spill incident and impacts
2. A broad overview of the ICS structure and organization for the current spill response
3. Environmental and cultural concerns related to the response
4. Liability issues
5. Limitations on non-professionals
6. General and specific job requirements
7. Site-specific hazards and work protocols
8. Safety and security procedures
9. Proper attire and safety equipment
10. Wildlife rescue and treatment, shoreline cleanup, food distribution, check-in procedures as appropriate to the assignment
11. Safety training for volunteers should address the following policies and procedures:
  - A. Drug and alcohol policies
  - B. Firearms limitations
  - C. Equipment use
  - D. Limitations for non-professionals

- E. Hazwoper training as required (see 2.a) 1. above)
  - F. General safety procedures (buddy system, safe lifting, etc.)
  - G. Evacuation procedures
  - H. Potential hazards of work environment
  - I. First Aid
  - J. Accident reporting procedures
12. The initial volunteer training may be supplemented by additional position-specific training provided once the volunteer is assigned to a job.
13. Job expectations must be clearly identified and the volunteer must agree in writing to assume any level of hazard associated with an assignment.
14. Provision of gear, supplies, and logistical support should be pre-identified to the extent possible and cached in appropriate locations. Once used, costs should be reimbursable by the RP or a response fund. Such equipment might include but is not limited to:
- A. Personal protective equipment, decon equipment, food, toilets, etc.
  - B. Adsorbents, trash bags
  - C. Communications equipment
  - D. First aid supplies
15. The following Safety and Operations Briefing Guide is provided in Appendix C of the 2005 International Oil Spill Conference Paper by Michael Gass and Henry Przelomski<sup>1</sup>:
- A. Hazards:
    - 1) Oil contact?
    - 2) Site hazards
      - a. Tripping, slipping, falling hazards
      - b. Wildlife
    - 1) Equipment hazards (noise, heat, fire, ingestion, movement)
    - 2) Weather conditions:
      - a. Precautions (storms, lightning, hypothermia, hyperthermia, sunburn)
      - b. Tides
    - 3) Site Description:
      - a. Hot zones (if IC/UC approves volunteer use here)
        - i. Work sectors
          - Temporary storage of oily wastes
          - Wildlife
      - b. Cold zones
        - i. Command post
        - ii. Facilities
        - iii. Rest areas (for shade or warmth)

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<sup>1</sup> *Volunteers: Benefit or Distraction? An International Protocol for Managing Volunteers During An Oil Spill Response.* Michael R. Gass, and Henry R. Przelomski. The 2005 International Oil Spill Conference.

- iv. Decontamination area
- 4) PPE to be worn (see Appendix 7) and procedures for disposal or storage for reuse
- 5) Decontamination protocols
- 6) Work assignments
  - a. Duties
  - b. Supervisor and reporting requirements; procedures for signing in/out
  - c. Equipment/tools
    - i. Instructions/examples
  - d. Work times/rest periods/feeding period/stop work time
  - e. The "buddy system," i.e., no one works or leaves area alone
  - f. Need to wear/display ID badges at all times
- 7) Communications
  - a. Emergency Signals and reporting procedures
  - b. Hand signals
  - c. Telephone or radio instructions
  - d. How/where to refer media questions
- 8) Emergency Medical Assistance:
  - a. Sources and contact numbers
  - b. First aid kit

### 3. Volunteer Supervision, Assignments, Management, and Demobilization

a) The following relevant U.S. Occupational Health and Safety Administration (OSHA) standards are provided here:

**1910.120(e)(4): Management and supervisor training.** On-site management and supervisors directly responsible for, or who supervise employees engaged in, hazardous waste operations shall receive 40 hours initial training, and three days of supervised field experience (the training may be reduced to 24 hours and one day if the only area of their responsibility is employees covered by paragraphs (e)(3)(ii) and (e)(3)(iii)) and at least eight additional hours of specialized training at the time of job assignment on such topics as, but not limited to, the employer's safety and health program and the associated employee training program, personal protective equipment program, spill containment program, and health hazard monitoring procedure and techniques.

#### **1910.120(e)(3)(ii)**

Workers on site only occasionally for a specific limited task (such as, but not limited to, ground water monitoring, land surveying, or geophysical surveying) and who are unlikely to be exposed over permissible exposure limits and published exposure limits shall receive a minimum of 24 hours of instruction off the site, and the minimum of one day actual field experience under the direct supervision of a trained, experienced supervisor.

### **1910.120(e)(3)(iii)**

Workers regularly on site who work in areas which have been monitored and fully characterized indicating that exposures are under permissible exposure limits and published exposure limits where respirators are not necessary, and the characterization indicates that there are no health hazards or the possibility of an emergency developing, shall receive a minimum of 24 hours of instruction off the site, and the minimum of one day actual field experience under the direct supervision of a trained, experienced supervisor.

Area Planners will need to determine whether state/provincial requirements are more stringent than the U.S. OSHA requirements (as well as Canadian federal requirements).

Regarding the issue of volunteer use in hot, warm, or cold zones, these zones will be defined by the Safety Officer. It is generally recommended that volunteers not be used in any zones requiring respiratory protection equipment or special medical monitoring.

b) Volunteer Supervisors should be pre-identified in order to ensure that an adequate number of supervisors are trained and available. The National Pollution Funds Center has indicated that volunteers must be supervised by local, state, or federal agency representatives in order to meet their reimbursement criteria. If reimbursement is not an issue, then potential volunteer supervisors may also include:

1. U.S. Coast Guard Auxiliary personnel
2. Conservation Corps personnel
3. Professional response contractors
4. Military agencies (e.g., the National Guard)

c) Proper supervision is important to the success of any operation, but this is especially so when dealing with inexperienced volunteers. They wish to succeed, and will want to be trained and managed in order to reach that goal. As noted in the 2005 International Oil Spill Conference Paper by Michael Gass and Henry Przelomski referenced above, they recommend one supervisor for every 10 workers. Span of Control decisions should be based on the nature of the tasks to which volunteers are assigned. Supervisor availability may also determine the number of volunteers that can be accommodated at any one time.

d) Michael Gass and Henry Przelomski suggest that it is the Supervisor's job to:

1. Provide proper briefings
2. Oversee operations at their sites
3. Ensure health and safety of volunteer works
4. Ensure that logistics requirements are met
5. Ensure proper collection, temporary storage, and disposal of oil and oily wastes
6. Ensure proper decontamination of workers, PPE, and equipment
7. Provide for a safe exit of workers
8. Maintain all required documentation

e) California's "Local Government Volunteer Management Plan" offers the following: "Volunteers must be supervised at all times during a spill response. Volunteers must be properly trained for the duties they will be performing and supervised by the agency they have been assigned to.

***Tips for Supervising Disaster Volunteers***

1. Practice - once trained, allow volunteers to practice with supervision until they have mastered the task
2. Praise good work - be generous with recognition
3. Be specific, brief, and clear in giving directions
4. Provide written instructions whenever possible
5. Correct mistakes or errors immediately
6. Watch for signals that people want increased responsibility
7. Watch for burn-out and rotate tasks or relieve volunteers appropriately
8. Plan and enforce suitable breaks
9. Be flexible and fair
10. Share information, especially when it is changing rapidly
11. De-brief - at the end of a shift/day, provide a forum for input, trouble-shooting and a review of work progress
12. Provide volunteers with the necessary safety equipment and supplies (gloves, vests, goggles, etc.) just as you would employees for performing their tasks
13. Record volunteer hours. A sample Volunteer Timesheet (Appendix 10) can be adapted to meet your organization's needs. Establish procedures for volunteers to sign in and out and instruct them appropriately.
14. If the situation arises where you need to terminate a volunteer, consult with the Volunteer Coordinator. It is very important to document volunteer actions in the event of a potential termination."

f) The U.S. National Oil and Hazardous Substances Pollution Contingency Plan (NCP) states that "Unless specifically requested by the On-Scene Coordinator or Remedial Project Manager, volunteers generally should not be used for physical removal or remedial activities. If in the judgment of the OSC/RPM, dangerous conditions exist, volunteers shall be restricted from on-scene operations." (40 CFR 300.185 (c)). Please reference Appendix 8 of this document, "Non-oil Recovery Work Areas for Volunteers." Restricting volunteers from working in "hot zones" can also reduce the amount of initial training as well as the level of PPE required. If, however, a decision is made by the OSC/RMP to allow volunteers to work in areas where some oil exists, this should only occur in areas where air quality has been tested to determine that it is safe for them to work without respiratory protection, or where exposure would not trigger a medical surveillance program.

g) Volunteer assignments will be made by the Volunteer Coordinator at the Volunteer Operations Center, working through the Resources Unit of the Planning Section (or Logistics; see B.1.c)2 above). The VC would refer volunteers to appropriate ICS units or activities where they can apply their skills and interests. Additional screening, training and supervision would then be provided by the ICS unit or Field supervisor to which the volunteer is referred.

h) Another model as outlined in the Kodiak, AK Subarea Plan, requires that responding agencies, contractors, organizations, or ICS unit leaders will submit Volunteer Request forms (Appendix 11) to identify volunteer needs. They should submit these to the Volunteer Coordinator at the Volunteer Operations Center. Once the volunteers are assigned, supervision will be provided by the unit leaders, as well as additional training if needed.

i) Area planners should consider whether supervised volunteer teams will be integrated into clean-up activities being carried out by OSROs and hired contractors. Professional responders may not choose to work in the same areas as volunteers for liability reasons.

j) It is important to track volunteers. The following are suggestions for volunteer identification and record keeping:

1. Develop and maintain a database of current interested volunteers and skills using appropriate computer software
2. Require that unit leaders or agency personnel document all volunteer hours worked.

k) The following section on demobilization is taken from California's "Local Government Volunteer Management Plan": "As the need for volunteers winds down, the UC will de-activate the VOC. In a major response, VOCs will close down until only the primary VOC is still activated. As activity subsides at the primary VOC, the Volunteer Coordinator will manage ongoing volunteer operations. Final duties for VOC staff should include coordinating de-briefing opportunities for volunteers, as well as any follow-up recognition which local governments or the state/province would like to provide to citizens who volunteered their time and energy in the spill response.

1. Volunteer Debriefing:

- A. It is also important to consider providing debriefing services for volunteers heavily involved in the response. It is up to the discretion of the supervising staff to determine which volunteers may benefit from debriefing services.
- B. Stress and burnout are common issues for staff who work in disaster response and recovery. It is important for VOC staff to monitor stress levels and encourage breaks among one another whenever possible. Positions at stations which seem most prone to stress should be rotated frequently and have a shorter duration of shift. If at all possible, the VOC should have a designated break area away from the public to provide a resting area for staff. Healthy food, water and opportunities for frequent breaks will help counteract the stress level of disaster operations.
- C. It is helpful to bring in professional mental health experts (possibly from local government) to help with critical incident stress issues for VOC staff. These counselors can provide team debriefings periodically, or individual stress counseling as needed. It is particularly important that all staff working in the disaster attend a formal debriefing BEFORE transitioning back to their regular work. Disaster mental health counseling services can be the critical link

to a successful recovery and return to normalization for staff involved in response and recovery efforts.

## 2. Volunteer Recognition

- A. Publicly acknowledge their efforts through the JIC and on the incident website
- B. One of the final duties VOC staff may engage in is helping coordinate recognition for the volunteers who assisted during the spill response. Formal recognition, such as events, letters from elected officials, after-action newsletters, and certificates of appreciation or special commendations are all good ways to show appreciation to volunteers once the disaster has subsided and recovery is underway. An ad in the local newspaper listing and thanking volunteers is another way to recognize volunteers. See Appendix 9, *Ways to Recognize and Honor Volunteers*.
- C. Any kind of recognition, no matter how big or small, tells volunteers how much local government and the State appreciates their efforts. Informal recognition, even a simple thank you, can mean the most and can take place throughout the duration of disaster operations.

## 3. Lessons Learned:

- A. Communities pay a high price during an oil spill incident, and it would be a tremendous waste not to share the value of lessons learned with others. As operations subside, it is important to record and document lessons learned from each spill experience. Every response is a learning opportunity for the next spill. It is extremely valuable to document these learnings. Consider bringing in an outside party to analyze and report on the learnings from your operation. A summary report will make it easier to share with others what has been learned and will help make the next operation even more successful.
- B. Additionally, the volunteer function should be included in any debriefings or sessions on lessons learned conducted by OSPR, the RP, the Coast Guard or local government at the end of a response.

## 4. [Insurance and Liability](#)

a) Area planners should determine whether and how liability and/or worker's compensation insurance coverage can be provided for volunteers, and under what conditions. Questions to answer include:

1. Can it be provided by the state or province? By the managing agency or NGO?
2. At what point does a convergent volunteer qualify for insurance protection - after registration or after meeting training requirements?
3. Will insurance cover medical expenses, vehicle accidents, disability, and accidental death?
4. Are there liability issues for the RP and OSROs associated with the use of volunteers?

b) The Volunteer Coordinator should have all convergent volunteers sign a release form that has been prepared by an attorney. This will help clarify the expectations of both the volunteers and the Volunteer Coordinator who will be implementing the Convergent Volunteer Program as outlined in the Area Plan. The release should address awareness of exposure to hazards and risks and a statement that service is provided voluntarily and without expectation of payment (in the case of "true" volunteers).

#### 5. Program Funding and Authorities

a) Implementation and maintenance costs for a volunteer program will need to be ascertained and built into response planning.

b) Area Planners should determine whether volunteer management costs are reimbursable by the Oil Spill Liability Trust Fund (U.S.), the Ship-Source Oil Pollution Fund (Canada), or state/Provincial funds, if available.

c) If volunteers are to be reimbursed for any travel expenses, this should be clarified in the Volunteer Management Plan and stated in any agreements which volunteers sign at registration.

d) Area planners should also determine whether statutory or regulatory changes are necessary to cover expenses, liabilities, or authorities.

APPENDIX 1  
**Planning Guidelines for Convergent Volunteer Management  
Project Workgroup**

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## Appendix 2

### Resources Used in the Development of These Guidelines

- *Kodiak Subarea Contingency Plan, Resources, Part Four - Volunteer Coordination Plan*
- *California's Local Government Management Plan*
- *California's Volunteer Guidance Manual*
- *Volunteers: Benefit or Distraction? An International Protocol for Managing Volunteers During An Oil Spill Response.* Michael R. Gass, and Henry R. Przelomski. The 2005 International Oil Spill Conference.
- *Volunteer Management Conceptual Model* developed by Dave Byers, Washington Department of Ecology

Appendix 3  
**Sample Volunteer Registration Forms**  
**Sample #1: Kodiak Subarea Plan Volunteer Registration Form (Figure B-4)**

**VOLUNTEER REGISTRATION FORM**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Phone (day): \_\_\_\_\_ (eve.) \_\_\_\_\_ (fax) \_\_\_\_\_

Address: \_\_\_\_\_

Present employer: \_\_\_\_\_ Occupation: \_\_\_\_\_

Are you currently affiliated with any response organization/volunteer group? which? \_\_\_\_\_

Are you certified in any of the following?      Certification Type/Agency\*      Expiration Date

Bird Rescue/Wildlife Hazing/Rehab: \_\_\_\_\_

Hazmat/Hazwoper: \_\_\_\_\_

First Aid/CPR: \_\_\_\_\_

Coast Guard licenses: \_\_\_\_\_

Other: \_\_\_\_\_

- Placement Preference:     Bird or Wildlife Rescue/Rehab  
                                    Shoreline/Beach Clean Up  
                                    Administrative/Clerical  
                                    Basic Needs/Logistics  
                                    On-Water operations  
                                    Other \_\_\_\_\_

Emergency Contact - Name: \_\_\_\_\_ Phone (day & eve): \_\_\_\_\_

Address: \_\_\_\_\_

Waiver:

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**FOR OFFICE USE ONLY:**

Training completed? \_\_\_\_\_ Date completed \_\_\_\_\_ Initials \_\_\_\_\_

Placed: \_\_\_\_\_ Date: \_\_\_\_\_ By: \_\_\_\_\_

\*Recommend required copies of all certifications

**Appendix 3, Sample Volunteer Registration Forms, continued:  
Sample #2: California's Local Government Volunteer Plan, Attachment K:**

**Volunteer Information**

**Fill in the appropriate information below and return it to:** (insert mailing or email address here - consider providing an interactive version on the state/provincial website)

Last Name \_\_\_\_\_ First \_\_\_\_\_ M.I. \_\_\_\_\_  
 Email Address \_\_\_\_\_  
 SSN \_\_\_\_\_ (determine if this is necessary, considering identity security concerns)  
 Street or PO Box address \_\_\_\_\_  
 Phone: Day \_\_\_\_\_ Evening \_\_\_\_\_ Cell \_\_\_\_\_ Pager \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_  
 Birthday \_\_\_\_\_ Gender  M  F Occupation \_\_\_\_\_  
 Drivers License No \_\_\_\_\_ (determine if this is necessary, considering identity security concerns)  
 Volunteer Operations Center \_\_\_\_\_

**Emergency Contact:**

Name \_\_\_\_\_ Driver?  Y  N  
 Street Address \_\_\_\_\_  
 City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_  
 Phone: Day \_\_\_\_\_ Evening \_\_\_\_\_ Cell \_\_\_\_\_ Pager \_\_\_\_\_

**Skills**

Animal Handling

Animal Health/Veterinary Tech  
 Bleeding  
 Holder  
 Intake  
 Rinser  
 Search Collection  
 Tubing  
 Washer  
 Veterinarian  
 Other

Non-Animal Handling

<input type="checkbox"/> Cage Cleaning	<input type="checkbox"/> Clerical
<input type="checkbox"/> Communication System	<input type="checkbox"/> Errands
<input type="checkbox"/> Computer Data Entry	<input type="checkbox"/> Construction
<input type="checkbox"/> Electrician	<input type="checkbox"/> Food Prep
<input type="checkbox"/> Heavy Equipment Operation	<input type="checkbox"/> Pools
<input type="checkbox"/> Lab Tech	<input type="checkbox"/> Laundry
<input type="checkbox"/> Logistics	<input type="checkbox"/> Phone Bank
<input type="checkbox"/> Physical Labor	<input type="checkbox"/> Scribe
<input type="checkbox"/> Volunteer Orientation	<input type="checkbox"/> Other

**Additional Training and Experience:** (Such as Hazwoper training - if so, indicate whether 4 hours, 24 hours, 40 hours. Copy of certification required)

Oil Spill Experience? If yes, list spills by date and incident name.

## Appendix 4 Sample Press Release

(Source: California Local Government Volunteer Plan, Attachment F)

**Agency logo(s)**

**Date:**

**Time:**

**Contact:**

**Phone:**

**Fax:**

### ***I. For Immediate Release (Insert suggested title for news article)***

City Name, CA – In response to the approximately X gallons of spilled (product name) in (location), the (U.S. Coast Guard / Office of Spill Prevention and Response / Oiled Wildlife Care Network) has/have activated a Volunteer Hotline (1-800-228-4544). The Volunteer Hotline will be updated frequently with information on the spill and the response, and callers can leave a message noting their name, phone number, skills, and availability to help.

Volunteers have been extensively used in previous oil spill responses, with activities coordinated through a Unified Command (a decision structure that includes federal and state government representatives). By calling the Volunteer Hotline number, prospective volunteers will get the most up-to-date information on whether their time and skills will be needed to support the Unified Command in its response to possible wildlife impacts.

Volunteers and other people are advised to stay away from the spill site, as their presence can hamper clean-up efforts and increase the danger to both wildlife and humans. Oil is a hazardous material, and to work in or near the oil, one is required to have completed appropriate Hazardous Materials training. Additionally, for the safety of both the public and the animals, only trained wildlife specialists will handle oiled wildlife.

The public can help at this time by reporting any oiled animals to (name of responding OWCN facility) at (general phone number - not the Volunteer Hotline number). This facility is a member of the statewide Oiled Wildlife Care Network, which uses modern equipment and facilities and has trained staff to care for the oiled wildlife. Personnel experienced in animal capture and handling will respond at the earliest opportunity, presenting the best chance for wildlife survival. The public's cooperation is greatly appreciated.

Please call the Volunteer Hotline (1-800-228-4544) for frequent recorded updates.

## Appendix 5

### Volunteer Operations Center Guidance

(Source #1: The Kodiak Subarea Plan, Part C, Volunteer Referral Center)

#### Facility:

The VRC should provide:

- Easy public access
- Room for training and orientation
- Basic communications capabilities and office equipment
  - Telephones
  - 2-3 phone lines, one of which is toll free incoming only
  - Fax machine and 2 dedicated fax lines (ingoing & outgoing)
  - Communication link to Command Center
  - Access to news & information releases to media and local government in order to advertise volunteer needs and toll free number
  - Computers and printers
  - Copier
  - Maps, flip charts, bulletin boards, pens, tape, markers
  - Paper, pens, pencils, stapler and other general office supplies

#### Establishment:

In setting up the VRC, the Volunteer Coordinator should consider the following:

- Arrange space to allow for foot traffic and to maximize wall space.
- Face tables and chairs so that information can be viewed easily.
- Allow enough space, pens, clipboards, etc. so that volunteers can fill out registration materials.
- Clearly identify the reception desk/area.
- Provide seating.
- Post signs directing potential volunteers to the building/room.
- In the event of a large spill response where sufficient staffing is available at the VRC and volunteer needs are extensive, set up stations for each major class of work, such as:
  - administrative
  - communications
  - shoreline operations
  - on-water operations
  - wildlife recovery/rehabilitation
  - repair/construction
  - logistical support
- Assign early volunteers to staff the Referral Center and to be couriers to bring information about volunteer needs from the Command Center to the VRC.
- Set aside time and space for training and orientation.
- Set up an information bulletin board. This area may serve as an informal information and referral area.

## Appendix 5, Volunteer Operations Center Guidance, continued:

Early volunteers should be used to supplement staffing of the VRC. Staffing needs at the VRC should include:

- Receptionist: answers questions, phones, gives out forms & directions
- Data Entry Clerk: enter personnel information into database
- File Clerk: files, copies, sends & receives faxes
- Intake and Referral Personnel: conducts initial screening, matches volunteers with needs
- Communications: compiles updates of volunteer needs, maintains bulletin board
- Training: coordinates/conducts general training & orientation for all volunteers
- Facility Support: maintains equipment, cleanliness, order
- Transportation: assist with transportation as needed
- Courier: serves as go-between for VRC and command center

***It is essential that all volunteers are routed through the Volunteer Referral Center. Volunteers arriving on scene who have not first checked in at the Referral Center must be referred back to the VRC for assignment.***

(Source #2: California Local Government Volunteer Plan, Attachments H, I, & J )

**Attachment H: Recommended Equipment Set-up** (*Adjust according to size and scope of operation*)

- **Waiting Area** - any couches or comfortable chairs available, locate near entrance
- **Reception Station** - near entrance, 1-2 tables, 3 chairs
- **Registration Station** - 2-3 rectangular tables, 6-8 chairs
- **VOC manager's Desk** - a desk or small table, 2 chairs
- **Orientation and Training Station** - one rectangular table or two small tables, 3-4 chairs

**Attachment I: Volunteer Operations Center Equipment and Supplies List**

*(Many of the following items can be gathered prior to an incident and kept in a "Go-Kit" ready to grab upon activation. It is especially helpful to have copies of all the necessary forms for registering and placing volunteers organized and ready to go. "Go-kits" can also contain basic office supplies, local maps, cellular phones and any other items useful for beginning operations.)*

- Volunteer Information Forms (CA Attachment K)
- Volunteer Service Agreements (CA Attachment D)
- Volunteer Timesheets (CA Attachment M)
- Authorization to Use Private Vehicle Forms (CA Attachment Q)
- Volunteer Interview Guide (CA Attachment P)
- 4-Hour HazCom Training Course Description (CA Attachment E)
- Volunteer Position Descriptions (CA Attachment L)
- Volunteer section of local oil spill plan
- Local maps

## Appendix 5, Volunteer Operations Center Guidance, continued:

- Poster board and large marker pens (for signage)
- Clipboards
- Pens and pencils
- Folders and labels
- Stapler, staples, pencil sharpener, tape, scissors, post-it notes, push pins, etc.
- Spiral notebooks (to create logbooks)
- Duct tape
- Fax machine
- Phones and phone lines
- Cellular phones
- Several large tables and chairs to set up stations for medium to large-scale operation

### **Attachment J: Volunteer Coordination Center Job Descriptions and Station Checklists**

The VOC can be adapted based on size of oil spill and volunteer needs. In a small-scale operation, one person can perform multiple roles, taking on the responsibility for more than one station. In a large-scale operation, 1-3 people can be assigned to each role/station, expanding the capacity of the VOC to process a larger number of volunteers.

#### **Reception Station**

Designate a reception desk or table near the entrance with a "waiting area" to greet volunteers as they arrive, and handle public questions and concerns. Because of the potential visibility of a VOC, it is anticipated that this station will also serve as an informal information and referral desk.

#### **Receptionist**

The Receptionist function is usually activated in a medium to large-scale incident. VOC staff assigned to the role of Receptionist are the first point of contact with the public; they answer phone calls, greet prospective volunteers and answer questions regarding State guidelines for oil spill volunteers.

#### **Job Description**

The major responsibilities of the Receptionist include, but are not limited to:

- Greeting volunteers and responding to public phone calls and walk-in inquiries. During a medium-level response, one person can answer phones and one person can respond to walk-in volunteers. In a large-scale response, public calls can be handled by additional staff and a phone bank with multiple lines can be set up.
- Directing people to the appropriate source if they have needs other than to volunteer (would like to drop off a donation, want to report an oiled animal, contaminated zone, etc.).
- Assisting with the distribution of information regarding volunteer priorities and needs.
- Distributing forms to potential volunteers.

#### **Reception Station Checklist**

- Determine each person's need as soon as they come to the VOC (people may come for reasons other than to volunteer, such as seeking more information, dropping off donations, reporting contaminated animals or sites, etc.).

## **Appendix 5, Volunteer Operations Center Guidance, continued:**

- Create and maintain a referral list for directing non-volunteer-related inquiries during the incident response. Information should be updated daily or as new information becomes available.
- Once you have established the person is at the VOC to volunteer, briefly explain the purpose of the VOC. For those who are not there to volunteer, refer them to the appropriate agency.
- Give the potential volunteer a Volunteer Information Form and Volunteer Service Agreement (Attachments K&D) to fill out in the waiting area.
- Direct the potential volunteer to the Registration Station once they have completed Volunteer Information Form and Volunteer Service Agreement (Attachments K&D), or to the waiting area, as necessary.
- If there are large numbers of people in the waiting area, you may have to field questions regarding the status of their application. Stay in close contact with the VOC Manager to keep updated on the availability of positions, etc.
- If there is a need to recruit for a particular skill, post signs in the waiting area or near the Reception Station.

### **Registration Station**

The Registration Station follows the Reception Station. The VOC staff will sit down with volunteers, conduct a brief screening interview and help them complete their registration forms at this station. This station should have several tables and chairs and will most likely need the greatest number of staff assigned to it.

#### ***Interviewer***

VOC staff assigned to the position of Interviewer will be placed at the Registration Station. They will have the most interaction with prospective volunteers and will assure that all of the information needed from the volunteer is properly documented.

#### ***Job Description***

The major responsibilities of the Interviewer include, but are not limited to:

- Conducting a brief screening interview with the prospective volunteer.
- Verifying training experience of volunteer.
- Determining if the volunteer has any special needs (such as physical limitations).
- Explaining open volunteer positions to prospective volunteer and answering any questions the person may have about the volunteer assignment(s).
- If volunteer agrees to take position, confirming that they have filled out all the necessary paperwork.
- Administering the loyalty oath (if required)

#### ***Registration Station Checklist***

- Make sure the Volunteer Information Form and Volunteer Service Agreement (Attachments K&D) forms are filled out correctly. Assist prospective volunteer, if necessary.
- Conduct a brief screening interview utilizing the Volunteer Interview Guide (Attachment P).
- Review with volunteer:
  - priority skills and abilities
  - whether or not they are 18 years of age

## Appendix 5, Volunteer Operations Center Guidance, continued:

- physical limitations
  - language skills
  - availability
- Match volunteer to available position, utilizing the Volunteer Position Descriptions (Attachment L).
  - If volunteer position involves driving, have volunteer complete the Authorization to Use Private Vehicle (Attachment Q).
  - If assignment is at OWCN facility, assign volunteer to specific OWCN staff person as direct supervisor.
  - Briefly explain assignment to volunteer.
  - If volunteer accepts position, note referral in log. Be sure to record all volunteer placements.
  - Direct volunteer to Orientation and Training Station to sign up for necessary orientation and training. At a minimum, all volunteers must complete the 4-Hour HazCom Training.
  - If unable to place volunteer at this time, explain situation and give him/her an idea of when you will call back.
  - Have the Oath of Allegiance administered, at which time VOC staff and volunteer sign the oath on the Volunteer Service Agreement (Attachment D). Only an employee from CDFG can administer the Oath of Allegiance.
  - If you have concerns during the interview, DO NOT place the volunteer. Inform volunteer you will get back to them and consult with the VOC Manager.
  - Create a Registration Station Log and document any notes, questions or concerns you have about the volunteer.
  - Let the volunteer know that there may be a wait and how they will be contacted. For example - by phone, please wait, check back in a few hours, check back tomorrow, etc.
  - Keep in periodic contact with the OWCN Response Coordinator and field staff supervisors regarding specific volunteer positions that need to be filled.

### Orientation & Training Station

This station coordinates the orientation and training of volunteers. VOC staff organize the logistics of orientation and training, coordinating with OSPR Site Safety Officer to assure that all HAZWOPER and Health and Safety requirements are met. A separate room or several annexed rooms provide the ideal location for this function.

#### *Orientation and Training Coordinator*

The VOC Staff assigned to the position of Orientation and Training Coordinator will be placed at Orientation and Training Station. Their role is to assure that all training requirements are fulfilled and to coordinate training sessions with OSPR's Industrial Hygienist (IH).

#### *Job Description*

The major responsibilities of the Orientation and Training Coordinator include, but are not limited to:

- Scheduling 4-hour HazCom training for groups of volunteers with the OSPR IH or designated IH

## **Appendix 5, Volunteer Operations Center Guidance, continued:**

- Checking volunteer application for previous training received and dates trained
- Assuring State health and safety training requirements for volunteers are met
- Providing support to OWCN or field staff regarding volunteer management practices

### ***Orientation & Training Station Checklist***

- ✓ Upon receipt of volunteer placement information from the Registration Station, confirm assignment specifications:
  - job location
  - who the volunteer supervisor on site will be
  - duration of shifts
  - when volunteers should begin
  - equipment volunteers should bring and appropriate dress (gloves, type of shoes, etc.)
  - transportation for volunteers to and from work site
  - training required for this position
- ✓ Verify volunteer's training history with OSPR training records, if possible.
- ✓ Schedule volunteer for required orientation and training sessions, utilizing the Volunteer Position Descriptions (Attachment L) - All volunteers must complete the 4-hour HazCom Training Course (Attachment E).
- ✓ Coordinate orientation and training details with OSPR IH or designated IH.
- ✓ Schedule necessary training sessions, arranging for instructor, facilities and equipment.
- ✓ Provide Request for Volunteer Assistance Form (Attachment R) to OWCN or field staff who are requesting volunteers.
- ✓ Serve as a volunteer management consultant to field staff to ensure appropriate volunteer management practices (e.g., volunteers receive breaks, situation briefings, have appropriate safety equipment).

Area Planners are also advised to reference the "Volunteer Operations Center Staff Job Descriptions" in the California Volunteer Guidance Manual pages 22-30.

## Appendix 6

### Volunteer Interview Guide

(Source: California Local Government Volunteer Plan, Attachment P)

*Suggested questions for interviewing oil spill volunteers:*

1. Have you had HazCom training, HAZWOPER training or any other special training for this type of work? If yes, how long ago?\*
2. Have you ever volunteered in an oil spill before?
3. Are you comfortable working in a stressful environment? Describe any experiences you have had working in a stressful environment.
4. When, and for how long are you available?
5. Are you 18 years of age?
6. What skills/abilities do you have which may be useful as an oil spill volunteer?
7. What type of work would you like to do?
8. Are there any special restrictions or limitations to the type of work you can do?
9. Do you speak any language other than English?
10. Why would you like to volunteer?

*NOTE: One PRP has also requested that volunteers be able to verify their citizenship.*

*Close the interview by asking the volunteer if they have any questions, letting them know the next steps in the process, and thanking them for offering to volunteer.*

\* Copies of certifications should be required

## Appendix 7

### Guidelines on Personal Protective Equipment

(Source: the following guidelines on Personal Protective Equipment was provided as Appendix D of the 2005 International Oil Spill Conference Paper by Michael Gass and Henry Przelomski)

This list identifies the suggested minimum PPE for coastline oil spill cleanup. A basic assumption is that the atmosphere is safe to breathe and work in; therefore there is no respiratory protection. The primary hazards encountered during oil cleanup for a coastal area are skin irritation due to exposure to oil, and slips, trips, and falls due to the slippery nature of the oil.

- Suggested Minimum PPE for manual oil cleanup where contact with oil is expected:
  - Impermeable jacket, pants, and gloves
  - Safety boots that may be cleaned and reused (or Hazmat over-boots may be used over shoes)
  - Eye protection (goggles)
  - Head protection (hard hat)
- NOTE: Expect to dispose of gloves, overboots, and synthetic coveralls after each day's use.
- Other PPE to consider depending on site, environmental conditions, extent of oil contact, and nature of work:
  - Chest waders
  - Day-glow vest
  - Ear plugs
  - Heavy fabric work gloves
  - Personal flotation device (life jacket)
  - Safety glasses or face shields

## Appendix 8

### Non-oil Recovery Work Areas for Volunteers

(Source: the following was provided as Appendix B of the 2005 International Oil Spill Conference Paper by Michael Gass and Henry Przelomski)

#### Logistics

- Inventory Control
- Procurement
- Distribution of PPE
- Cleaning of PPE\*
- Construction of temporary structures

#### Transportation

- Carpools
- Trucking
- Vehicle cleaning\*
- Scheduling
- Dispatching
- Road building

Food Preparation and Distribution (certain minimum food handling criteria may need to be met as required by State and local regulations)

- Cooking
- Serving
- Cleanup
- Stocking

#### Medical

- First aid attendants\*
- Dispatching
- Transporting sick or injured persons

#### Shoreline cleanup support

- Removal of non-oiled debris and trash prior to oiling
- Guides or SCAT Teams\*
- Crowd control, onlooker security

#### Personnel Services

- Lodging attendants
- Laundry service
- Message center

## **Appendix 8, Non-oil Recovery Work Areas for Volunteers, continued:**

### Boat Operation (boat owners who volunteer)

- Area security (directing other vessels away from contaminated areas while allowing work vessels in )
- Observation of floating oil/wildlife
- Transporting assessment teams or cleanup crews

### Wildlife Rehabilitation\*(also requires specific training)

- Beach patrol/Wildlife notification
- Oiled Wildlife retrieval and transport\*
- Bird cleaning\*
- Phone answering, dispatching, messaging

### Public Relations and Community Liaison

- Guide Visitors and media
- Open houses for lodging for workers
- VOC staffing

\*Indicates that person may be exposed to some oil, so specific hazard training is required

## Appendix 9

### **Ways to Recognize and Honor Volunteers**

(Based on the California Local Government Volunteer Plan, Attachment O)

- Take time to listen
- Smile
- Provide orientation
- Provide good training
- Communicate clearly
- Provide nametags or other forms of official identification
- Call them by name and respect individual needs
- Maintain safe working conditions
- Facilitate daily feedback sessions that include updates on the incident status
- Seek their suggestions, and act on their ideas whenever possible
- Enforce breaks
- Provide beverages, healthy snacks, and meals
- Provide child care
- Make good job matches; honor their preferences whenever possible
- Praise their efforts and say "thank you"
- Give added responsibilities when possible - keep them challenged and satisfied
- Send letters of appreciation to their employer and/or families
- Provide job references if appropriate
- Provide a message board
- Honor exceptional work teams
- Post their accomplishments in a visible location
- Promote their accomplishments to the media
- Provide debriefing opportunities
- Give them stuff - T-shirts, caps, buttons, plaques, patches, certificates
- Write thank-you notes
- Host a recognition event with special achievement awards
- Sponsor a reunion



