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BEST PRACTICE

Volunteer and Donations Management: Phone Bank Operations

PURPOSE

Discusses processes for operating phone banks and for managing offers to donate goods and services during an emergency.

SUMMARY

Phone bank operations and information management tools are essential for coordinating and managing volunteers and donations. Volunteer and donations managers should develop plans for phone bank operations and data management to track offers of donated goods and services during an emergency. Volunteer and donations management personnel should include these plans and procedures in their state's donations management plan.

DESCRIPTION

Phone bank operations coordinate all offers to donate goods and services after a disaster. The phone bank also serves as a coordinating body among the state emergency operations center, donations coordination center (DCC), volunteer reception center (VRC), warehouse operations, voluntary agencies, volunteers, donors, and those in need. Successful phone bank operations require maintaining a database of offers of goods and services, a needs list, and a resources list. There are a variety of ways to manage this information based on available resources.

Establishing a Phone Bank

Several factors will determine whether a phone bank is established after an emergency incident, particularly the magnitude of the emergency and the amount of media attention it receives. Localized incidents will not receive national media attention and, thus, may not require an extensive phone bank operation.

Operating and Staffing the Phone Bank

The state is responsible for establishing a toll-free hotline. An agency should be designated to establish the phone bank within the state volunteer and donations management plans. The agency in charge should also be responsible for staffing the phone bank. Emergency managers should choose a voluntary agency which has the personnel and resources to operate a phone bank. Other important considerations for establishing a phone bank include:

- **Location:** Ideally, the phone bank should be located within the DCC, although donations managers should be prepared to locate one anywhere. A large space is essential, preferably with two rooms to provide for training and meetings. Donations managers can negotiate a memorandum of understanding with a location that uses

multiple phones and phone lines such as the local 211 or public information number. A list of requirements is discussed in more detail below.

- **Hours:** For large disasters, the phone bank usually stays open for 24 hours a day during the first week or two. The operating hours for the phone bank should be determined by the demand. Operating hours for the phone bank will vary greatly depending on the type and size of the disaster.
- **Staff:** It is necessary to have dedicated staff because phone operators must be trained ahead of time. AmeriCorps or the Retired and Senior Volunteer Program (RSVP) are examples of programs that can be contacted to provide volunteers to operate the phone bank. Phone banks are often employed by state employees and state Voluntary Organizations Active in Disasters (VOAD) members. It is also valuable to have an information technology staff member available for the phone bank in case technological problems occur. A phone bank supervisor, floor supervisor and a trainer should be appointed to oversee operations.
- **Telephone system:** The telephones at the phone bank should include hands-free head-sets for operators and roll-over capabilities. The phone bank supervisor should ensure that there is an answering or voice mail system established for after-hours.

Multiple Phone Banks

Large-scale emergencies may require the establishment of several phone banks at the DCC, VRC, and/or a community information system. All phone banks or information systems must work collectively, and phone bank operators must be able to direct all inquires to the appropriate place.

Phone Bank Site Requirements

The following are suggestions for phone bank site requirements and supplies:

- Office space or large room (approx. 3,000 sq. ft.)
- Telephones
- Telephone lines (50 for a large emergency)
- Operator head-sets
- Chairs
- 6-ft tables
- Display board or chalk board
- Copy machine
- Fax machine
- Printer
- Printer paper
- Computers
- Internet hook-up
- Pens and pencils
- Easels
- Overhead projector
- Refreshments (coffee, tea, water, etc.)

Response Operations

Once the phone bank has been established and is operating, the supervisors should ensure that the operator's scripts are constantly updated with new information. Operators take

calls and document the information as it is received. The floor supervisor should always be on the floor to answer questions about calls or referrals.

Offers of goods and services should be prioritized according to the needs list. High-priority offers, such as baby food and diapers, should be processed immediately. Unneeded offers, such as used clothing should be declined. However, operators should be instructed to thank the donor for their offer and suggest another way they could give a useful donation. Phone bank operators should encourage cash donations to those who are unsure of how to provide assistance to response and recovery efforts. A list of all participating voluntary agencies should be given to phone bank operators so that they can provide agency descriptions to those who are unsure of which agency to support. (See the *Lessons Learned Information Sharing Best Practice: Volunteer and Donations Management: Managing and Distributing Donated Goods.*)

Phone Bank Operations Manual

Phone bank managers should ensure that there is a phone bank operations manual for their operators and volunteers. The manual should hold all the relevant information needed to process offers and make referrals. The manual should include:

- Scripts for operators;
- Relevant phone numbers for referrals;
- Intake form and list of important questions to ask (e.g., contact info, product info, arrival date and time, availability, etc.);
- Lists of Voluntary Organizations Active in Disaster (VOAD) agencies accepting cash and their contact information;
- Descriptions and information of VOAD agencies;
- Guidelines for how to decline an offer;
- Lists of distribution sites, food banks, shelters, animal shelters; and
- Guidelines for spontaneous volunteers and reference numbers.

2-1-1

29 states and Washington, DC have implemented a telephone system called [2-1-1](#) which connects people with important human services, information and volunteer opportunities. After Hurricane Frances in 2004, thousands of Florida residents utilized the system to find out when power would be restored and when it would be safe to return to their homes. The 2-1-1 system can also be used as a phone bank during a disaster.

Closing the Phone Bank

Phone bank operations slow down considerably as response operations transition into the recovery phase. When the phone bank is no longer needed for recovery operations, the donations coordinator will make the decision to demobilize. Before closing the phone bank, emergency managers should distribute a press release notifying response agencies, voluntary organizations, and the public that it will be closing. The press release should also give further information on local agencies and organizations that will continue to accept donations throughout the long-term recovery effort.

Donations management personnel should ensure that all donors, including those whose offers were declined, are sent a thank-you note from the accepting agency or operation. Phones should then be disconnected and equipment returned. Emergency managers should then check with phone companies to ensure that the phone bank hotline number is rolled over to the agency responsible for long-term recovery.

Data Management Software

Some states have donations management software programs which keep track of phone bank information and offers to donate goods and services in a database. However, there is no standardized software throughout the US. If donations management software is available, it is best to adopt that software and train phone bank operations staff on the tool before an emergency.

Donations management software programs can be helpful because it is easier for phone bank personnel to keep track of offers and store donor information. Some software programs also automatically generate thank you notes to donors in the system. However, it may take considerable time to train volunteers to use the donations management software.

The [Denton County, TX VOAD](#) has an array of templates for information management, including a [Record of Donation Offer](#), [Donations Management Log](#), and a [Donated Goods and Services Intake Form](#).

Templates and Forms

States without donations management software programs should develop spreadsheets or paper templates to manage volunteer and donation information. If using an electronic tracking system, emergency managers should plan for a situation where the DCC is without power and keep paper templates on hand.

The Points of Light Foundation and The Allstate Foundation produced the publication "[Ready to Respond: Disaster Preparedness and Response for Volunteer Centers](#)" which contains paper templates for [volunteer request forms](#) and [volunteer intake forms](#).

REFERENCES

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