



# Establishing and Maintaining Your MRC Unit's Organization

## Medical Reserve Corps Technical Assistance Series

*Produced by the MRC Program  
Technical Assistance Team*

[www.medicalreservecorps.gov](http://www.medicalreservecorps.gov)

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The **Medical Reserve Corps** is a specialized component  
of **Citizen Corps** and the **USA Freedom Corps**.



Office of the Surgeon General  
U.S. Department of Health and Human Services

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As part of its effort to support the growth of **Medical Reserve Corps (MRC)** units across the United States, the MRC program office—headquartered in the office of the U.S. Surgeon General—is developing a series of technical assistance booklets. Each one will address a topic considered important for MRC units. As each booklet is completed or updated, it will be available at: [www.medicalreservecorps.gov](http://www.medicalreservecorps.gov). Following are some of the topics covered:

- **Getting Started: A Guide for Local Leaders**

*Every MRC functions differently. The first step in forming a unit is to carefully evaluate your local situation. It is important to secure a broad base of support from others in your community. Identifying and acquiring resources will be essential to meeting your MRC's operational needs.*

- **Organizing an MRC Unit: Operational Components and the Coordinator's Role**

*The coordinator's main job is matching community needs for emergency medical response and public health initiatives with local volunteer capabilities. Establishing and sustaining the unit's internal organization also is a priority.*

- **Coordinating With Your Local Response Partners**

*MRC units supplement a community's existing emergency medical response capabilities and public health infrastructure. Coordinating with local response partners is critical, as is developing and nurturing a broad network of partners. Drilling with response partners will be necessary, as will close communications during and after an actual crisis or engagement.*

- **Developing Volunteer Relationships and Capabilities**

*Developing volunteer capabilities is a key mandate for every MRC unit. The process begins by getting the word out to the community. As volunteers are screened and matched with existing needs, they must be informed of any risks associated with their MRC activities. They also will require additional training.*

- **Establishing and Maintaining Your MRC Unit's Organization**

*A well-run organization is the foundation for every successful MRC unit. Information must be tracked and updated for volunteers and local partners. Policies must be established and followed. Operating funds will have to be solicited, along with leveraged public and private sector resources. Planning—strategically, financially, and operationally—is an essential, ongoing function of the MRC unit's administrators.*

- **Special Topics**

*Some of the more complex aspects of operating an MRC unit are related to differences in local laws and to the evolving technical nature of the MRC's work. For example, legal liability is something every unit member should know about. Other issues pertain to verifying volunteer credentials. Special booklets will be produced to address these and other emerging topics.*



The **Medical Reserve Corps** program is sponsored by the U.S. Surgeon General's Office in cooperation with the White House's **USA Freedom Corps** and the Department of Homeland Security's **Citizen Corps**.





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# **Establishing and Maintaining Your MRC Unit's Organization**

Produced by the  
MRC Program Technical Assistance Team  
**Office of the Surgeon General**  
U.S. Department of Health and Human Services

**The information in this booklet is intended as a general guide to establishing and operating a Medical Reserve Corps unit. It is not meant to discourage local initiative. For any of the issues addressed in this booklet, we strongly encourage communities to consider alternate approaches that may offer a better fit for their local conditions, resources, and needs. We also welcome learning from those successes.**

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MRC Technical Assistance Series  
Establishing and Maintaining Your MRC Unit's Organization

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Office of the Surgeon General • U.S. Department of Health and Human Services  
5600 Fishers Lane, Room 18-66 • Rockville, MD 20857  
(301) 443-4951 • (301) 480-1163 [Fax] • [MRCcontact@osophs.dhhs.gov](mailto:MRCcontact@osophs.dhhs.gov)

# Establishing and Maintaining Your MRC Unit's Organization

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## Establishing and Maintaining Your MRC Unit's Organization

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## Establishing and Maintaining Your MRC Unit's Organization

### Key Activities

The information in this booklet on starting an MRC unit is intended to support the following ongoing efforts:

1. **Developing and maintaining information tracking systems** in order to retrieve the information that will be critical to sustaining your MRC over the long run.
2. **Establishing and clarifying policies and procedures** so that your MRC volunteers can be trained to know what is expected of them and so they can be utilized with minimal risk of harm and legal liability.
3. **Planning and revisiting strategic, financial, and operational objectives** in order to measure effectiveness and progress, communicate success to vested constituents, and rechart your MRC unit's course in response to changes in your operating environment.
4. **Working toward long-term sustainability of your MRC unit** by considering how best to broaden your mission and community involvement, and by securing additional resources needed to keep your organization up and running over time.

## Establishing and Maintaining Your MRC Unit's Organization

### How This Booklet Is Organized

The information in this booklet is presented so that you can access it in a variety of ways. How you do so depends on how you learn best and what your immediate needs are.

#### **At-a-Glance**

A quick look through the contents will illustrate what we consider to be the main issues for this topic. What we propose by way of action is summarized on the preceding "Key Activities" page.

#### **Sequentially**

Some of us want to know the whole story, whether we read through all the text systematically or simply browse to get a basic sense of it. The material is sequenced so that it follows a logical progression, with each subtopic building on those that came before.

#### **Hitting the Key Points**

You can get the main points by reading only the boxes that highlight the ideas under each subtopic. If you need or want more, read through some of the nearby text.

#### **By Subtopic**

Each subtopic section is designed to stand alone. Look through the contents page in the beginning and find the section that addresses your current concerns.

#### **Focused on Action**

Since you may need to hit the ground running, each subtopic in this booklet features a list of suggested action steps. You can go directly to the subtopic that most immediately addresses your concerns, or you can work through the whole "Action Steps Checklist" featured in the back of this booklet.





**Covered in This Booklet**

**Tracking and  
Updating Information**  
≈  
**Establishing and  
Clarifying Policies**  
≈  
**Planning and Revisiting  
Strategic Priorities**  
≈  
**Working Toward  
Long-Term Sustainability**

**Introduction**

Even as you devote substantial time and resources to external coordination and volunteer relations, it is equally important to maintain a viable internal organization for your MRC unit. A number of ongoing administrative tasks will need to be tended to in order to best serve your volunteers and response partners. A healthy, well-run organization is the foundation of every successful MRC unit.

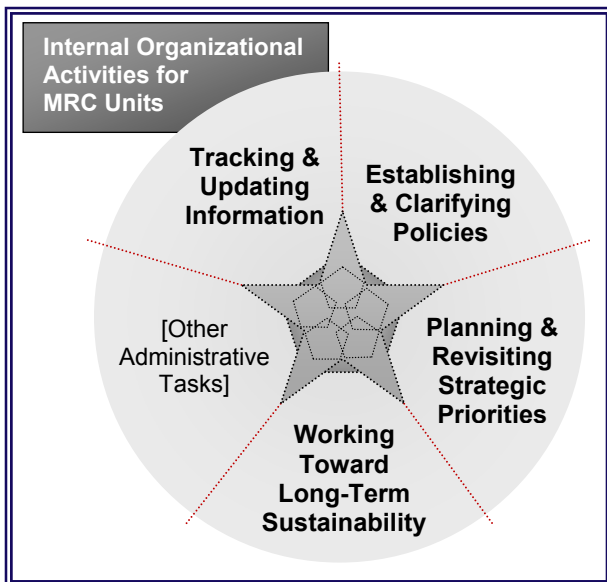
Anyone with prior administrative experience will be familiar with the work required to run an organization's internal operations, especially routine activities like facilities management, bookkeeping, recordkeeping, and the like. So instead of covering what may already be familiar to many MRC administrators, we will focus instead on those internal organizational activities that are most pertinent to MRC units.

For example, information must be accurately tracked and updated as it pertains to volunteers, local contacts and partners, and specific crises and engagements. Policies must be established for volunteer utilization, for monitoring

the appropriate use of MRC identification cards and badges, and for other issues. Those policies ideally will be reviewed and clarified based on feedback from the field. Similarly, ongoing strategic planning will require revisiting the priorities that currently guide your MRC's operations and vision, as well as your basic administrative procedures. And to sustain your unit over the long run, operating funds may have to be solicited and working relationships established in order to access or leverage necessary public and private sector resources.

Because ongoing internal activities can sometimes take a back seat to the pressures of any organization's primary business—in this case the utilization of MRC volunteers in coordination with response partners—we've highlighted and

separated out what we see as the key administrative tasks for every MRC unit. Though in practice these tasks are closely intertwined, discussing them separately can help emphasize their particular requirements.



**Attend carefully to your internal organizational needs, even as you devote substantial resources to external coordination and volunteer relations.**

*A healthy, well-run organization is the foundation of every successful MRC unit.*

*Determine what information you will need over the course of managing your MRC unit.*

*Then, set up a system to track it as easily as possible.*

## Tracking and Updating Information

Information management is a large part of any administrative function in an organization. It can include bookkeeping and other financial accounting tasks, preparing documentation for meetings and later writing up the minutes, handling routine communication among members of the organization, or even maintaining inventories of equipment or supplies.

For an MRC unit, all of these are tasks that can be performed by individuals with no medical or health training. Perhaps local AmeriCorps or Senior Corps volunteers may be able to assist. Nonetheless, these administrative activities are as essential to the success of the MRC as its primary focus on utilizing medical and health volunteers.

In this section we will discuss considerations for developing a volunteer database, part of which will hold the information required to maintain current identification cards for MRC volunteers. We will also review some of the items to track for the purposes of reporting on local medical or health engagements with your MRC volunteers. Finally, we will emphasize the importance of keeping records of local contacts, partners, and meetings.

### Developing a Volunteer Database

In its simplest form, a database is basically just a table of information. A list of names on a piece of paper is in fact a database. To make the list more useful, you might add phone numbers next to the names or categorize the names by type—for example, friends, business associates, family members, and so on. Many people keep databases of this kind electronically, either in their PDAs (personal digital assistants) or on their personal computers. People also keep databases in handwritten address books and in other non-electronic formats. The format you choose depends in part on your needs, the available technology, and your resources.

For MRC units, tracking volunteer-related information may allow easy access to current credentialing and qualifications information, rosters of active volunteers, and records of volunteer activity that may help with soliciting operating funds and with communicating success to the larger community.

Though we've focused here on tracking volunteer-related information because it is so fundamental to the MRC, your

### **Developing a Volunteer Database: Action Steps**

- *Determine what you want your database of volunteer information to do. What outputs and reports will you need? What functions must they perform?*
- *Design your database to include the information you will need to collect in order to fulfill those functions or outputs.*
  - ⇒ Balance between anticipating future information needs and building a system that overly exceeds your near-term needs.
- *Choose a database format—paper or computer-based—that fits your needs for data entry and retrieval, as well as your available resources.*
  - ⇒ Find out if your data and system will need to be compatible with that of your local response partners.
- *Decide what data you will need to collect from prospective volunteers before you begin interviewing them.*
- *Design your volunteer application forms so that they are easy to fill out and so that it is easy to transfer their data into a computer system (if that's the format you choose to use).*

MRC unit may ultimately require a variety of different databases. If so, the principles we describe here are applicable to those other data needs as well.

### **Designing the Database**

Whether you opt to use a paper-based or computerized database, deciding how you want the information organized is always the first step. You start by determining what you want the database to do. You may have certain reports to produce, for example, or you may need to compile statistics for volunteer utilization. You may need to reach people quickly. Or, you may need to easily verify a volunteer's credentials and other qualifications. These are just a few examples of the kind of requirements you may want to take into consideration while designing your database.

Of course, you may not know at the outset everything you will need the data to do for you. Begin by listing what you do know and add as you go along. Even corporations and large organizations with highly skilled planners and software programmers cannot predict the directions their information needs will take. Just as they often end up having to reengineer their database systems, you may need to adapt yours as well.

Once you know what information you need and for what purposes, you can determine what kind of data to collect and how best to organize it once captured. For instance, if you expect that you will need to know the names of all volunteers with experience in nursing, you'll want to make sure to collect information about your volunteers' experience and organize it so that you can quickly identify all individuals with that particular background or skill set. Likewise, if you might need to reach volunteers living in a particular neighborhood or ZIP code, make sure to collect that data and structure your database in a way that enables you to sort by geographic location.

The ways you might want to sort your data are nearly endless. So the best approach is to plan for your immediate needs and, if possible, think ahead to possible future uses. It is sometimes easier to collect and store information now, even if you don't immediately need it, than to go back and collect it later. Remember that evaluating your information needs is a constant process when working with a database. You will likely be required to adjust your database design as you go along based on your changing needs.

As a rule, design your database so that it is relatively easy to capture and enter data, and so that it is relatively

efficient to retrieve that data for your particular purposes. For example, if using a paper system, organize the items on the page so that they flow logically from one to the next and so that you can easily find the most frequently required information. If you are alphabetizing the pages by volunteer last name, for instance, place that piece of information prominently in the upper right or left corner. Computerized databases work basically the same way, and they may in principle offer greater flexibility and speed. Again, order your data entry fields so that they flow logically and so that the important fields are readily visible. Determine how you plan to sort the data (by name, ZIP code, profession, and so on), and make sure data is entered consistently and accurately in those fields.

Finally, avoid designing or investing in a system that far exceeds your foreseeable requirements. Plan to grow into your system over time based on changing needs, technology, and resources.

### **Choosing a Database Format**

A database refers to the physical and organizational structure used to capture and retrieve information. As we discussed in the previous section, some administrators use simple paper forms, perhaps filed alphabetically or numerically. Having the data readily available in that format may serve their purposes better than inputting data electronically and having to access a computer in order to retrieve it. However, computer-based data systems are becoming more commonly used as the cost of equipment and software drops and as administrators become more adept at using them. If you decide to use a computerized database, you will need a reliable system for backing up your data. Electronic media are typically used for backup, but paper-based printouts of that data can sometimes serve that purpose as well.

MRC units across the country have opted for a variety of computerized database formats. Some are keeping data in word processing documents that can be easily updated. Others are using spreadsheets, off-the-shelf database software, or even software specifically designed for managing volunteers. Still other units have decided on systems similar to those used by existing emergency response organizations or hospitals with whom they may be partnering in their communities.

This last option is an important consideration. You'll want to ask your local response partners if it will be beneficial, given the role your volunteers may play, to set up your database using a program that is the same or easily convertible to a program they are already using. If you find this to be the case, consult with those organizations on how best to standardize your database so that it is compatible with theirs. For example, if an emergency management agency uses its database to

automatically alert volunteers, your database may have to support that requirement as well.

The benefit of standardized databases is that data can be easily shared among response partners in a community and even across jurisdictions, particularly in the case of a regional or national disaster. In the future, such standardization may also ease deployment when MRC volunteers are traveling around the country or have moved to new locales.

In the end, each unit will decide on the most appropriate and most cost-effective system to meet its needs. Don't hesitate to ask others with expertise in data collection and management for their recommendations.

### **Collecting Volunteer Information**

The information collected for volunteers begins during the initial interview process. Before that interview takes place, however, you will likely have thought about what information you will need to gather and might even have considered the eventual design and format of your database.

The data you collect will probably include name, address, and other contact information, along with professional skills, education, training, current certification and licensures (including expiration dates), languages spoken, times of day available, how best to reach, and so on. Some MRC units require that applicants bring in copies of certifications, licensing, and other documentation of their education and credentials. *(For other data items to include on your application form, see the booklet titled, "Developing Volunteer Relationships and Capabilities.")*

The application form completed by a prospective volunteer should be formatted so that it is easy to complete, so that it covers everything you will need to gather, and so that transferring data from the form to a computer will be efficient (if that's the format you choose to use). Where appropriate, match data fields with blanks to be filled in by the applicant. As you discover a need to add new fields to or delete obsolete fields from the database, adjust your application form accordingly.

The importance of designing both your database and application forms before you start collecting data cannot be emphasized enough. Taking this step will go a long way toward making data entry easier and therefore making it more likely that information will be processed promptly rather than piling up and creating a backlog.

The information you collect can help you keep track of both active and inactive volunteers. You can use it not only to look at individuals but also to provide a broader view of your MRC,

### **Establishing a System for Identification: Action Steps**

- *Work with local response partners to determine the most useful information to include on your MRC volunteers' ID cards.*
  - ⇒ At a minimum you will probably want a recent photo, full name, signature, an identification number, and the name of your MRC unit.
  - ⇒ For cross-validation purposes, consider including numbers from a driver's license or from other professional credentials.
- *Find out if there is a system of identification already in use locally or at the state level.*
- *Determine with local response partners what information to include on MRC ID cards in order to quickly signal a volunteer's professional training and other necessary credentials or qualifications.*
- *Choose a method of producing the card that is secure so that IDs cannot be easily made or duplicated without authorization.*
- *Remember not to confuse an ID card with any of a number of different badges that may be utilized by your response partners in the event of an emergency or other utilization of MRC volunteers.*
- *Update IDs to match changes in a volunteer's profile or to reflect changes in the information system used among your response partners.*
- *Ask for the return of IDs when volunteers are no longer active members.*

showing the overall capacities of the unit as well as any gaps that may need to be filled.

### **Establishing a System for Identification**

One of the most important uses of the volunteer database is as an identification system for volunteers, and one of the essential administrative tasks of every MRC unit is establishing such a system. With a reliable method of identification, MRC volunteers can be properly recognized for particular kinds of engagements with response partners, especially when they are involved in situations where identification information may be otherwise hard to access.

At a minimum, an identification (ID) card should include the volunteer's photograph, full name, signature, an identification number, and the name of your MRC unit. For cross-validation purposes, it might also help to include a driver's license number or any other professional license or credential number(s). The card should be produced in a manner that makes it difficult to copy or duplicate without proper authorization.

The basic identification card should serve to identify an MRC volunteer by name and by affiliation with your unit, especially in situations where there may be no one else on hand to identify the volunteer as a valid member of the MRC. Beyond that, the card may be used in a variety of ways, depending on local needs and available resources. Any additional information on the card will reflect those local differences.

For example, in communities with access to more sophisticated technology, an ID with a barcode or other digital identification number might be scanned in order to gain remote access to your database of volunteer information. On the display, the volunteer's record would conceivably show information critical to volunteer utilization, such as professional experience, training, and credentials, as well as current status (i.e., active or inactive). The record might also provide a list of activities the volunteer is authorized to perform as well as particular sites for which the volunteer may have advance clearance or privileges, as happens in situations where volunteer physicians have hospital privileges for officially declared emergencies.

### **Integrating With Existing Identification Systems**

- Organizations in your state may already be developing a statewide, centralized system for identification of medical and health volunteers, especially for disaster or other emergency situations.
- Check with your local American Red Cross chapter, local and state emergency management agencies, volunteer centers, public health department, and local hospitals to find out if such an effort is already underway. It's important that your MRC database and its supporting system be integrated into that larger emergency response system.
- If no system is yet in place, your unit may want to work with these organizations to develop one, along with a database that best serves the broadest range of organizational and community needs.

A less technological approach that meets some of the same objectives is to produce an ID card with symbols that correspond to certain authorized activities or verified credentials. For example, a volunteer pharmacist who has been cleared to work in a public health or emergency medicine situation might have an ID card with a symbol verifying credentials as well as a symbol that indicates clearance to work in particular settings. The exact information needed for proper volunteer utilization will have to be worked out with your MRC's response partners, along with a set of symbols that would be universally recognized within that community of response partners.

It is important to remember that an MRC identification card is not the same as a badge or other form of access control typically used at the site of an emergency or other health response effort. Issuing badges of that type is typically done by the organization in charge of directing a particular response effort. In situations where badges are being used, the MRC volunteer would first present her or his ID card, which would function as a preliminary means of access. Any further involvement would then be determined on the scene of a particular engagement by person(s) with that designated authority, at which point an additional badge might be issued to the volunteer as a site- or engagement-specific form of identification and clearance.

The MRC unit's responsibility is simply to identify its volunteers in as clear, accurate, and efficient a manner as possible. In general, therefore, controlling use of MRC identification cards will also become part of the unit's administrative responsibility. Inactive or deactivated volunteers should be required to surrender their ID cards to prevent unauthorized use. It will also be necessary to make sure that the ID cards are kept current, especially when there are changes in the volunteer's profile or information, or when changes occur in the response system established with your response partners.

### **Collecting Engagement and Utilization Data**

Given that the MRC is a volunteer-driven initiative, collecting information about volunteer activities is

### **Collecting Engagement and Utilization Data: Action Steps**

- *Develop a volunteer activity tracking form.*
- *Use that form to keep track of the number of hours your volunteers put into their MRC activities. Break those numbers down by type of activity and by professional background.*
- *Use that form to keep track of the professional backgrounds or skills sets represented by your volunteer corps.*
- *Develop an engagement or utilization form that will help you keep track of the information you might want to consider later, when improving your system or filing an incident report.*
- *Use that form to keep track of the details of particular volunteer engagements or utilization, including drilling exercises.*
  - ⇒ Note the circumstances involved in deployment or utilization, the sequence of events from start to finish, the names of other organizations involved along with their roles and actual participation, difficulties encountered with respect to communication or other systems of activation, procedures that proved notably effective, and resources consumed in the course of the engagement, along with resources that could have been useful and resources that were unnecessary.
- *Use your engagement and utilization data during follow-up debriefings with volunteers and response partners as a way to improve response efforts the next time.*

always advisable. Statistics on volunteers can include professional background (for medical or health volunteers), or skills sets (for administrative and other support volunteers), and even the specialty knowledge offered by volunteer experts (i.e., lawyers, financial consultants, public relations experts, etc.)

You'll probably want to know how many volunteer hours were given over the course of a year, perhaps broken out by professional types. This would let you know how many hours had been volunteered by different classes of volunteers—for example, public health workers, mental health professionals, or administrative support personnel.

It may also be helpful to keep track of the type of activities that your volunteers engage in to get a clear picture of their overall involvement and utilization. Having on hand an accurate picture of the average volunteer's involvement can help during recruiting efforts to give prospective volunteers a more accurate picture of what will be expected of them. Types of activities could include: meetings, trainings, exercises/drilling with response partners, actual deployment or utilization (during periods of non-crisis and during emergencies), debriefings, and so on.

In addition to recording volunteer hours, it is also advisable to keep track of the details of particular volunteer engagements or utilizations. Make note of the circumstances involved in deployment or utilization, the sequence of events from start to finish, dates and times, the names of other organizations involved along with their roles and actual participation, and the names of all involved personnel. Also note any difficulties encountered with respect to communication or other systems of activation, procedures that proved notably effective, resources consumed in the course of the engagement, resources that could have been useful, and those that proved unnecessary. It can help to design a form that lists the various pieces of information you will want to record each time. Such a list can remind you what data to collect during stressful engagements when you may otherwise find it hard to reflect and remember.

All of that engagement or utilization information will allow you to provide feedback during



### **Keeping a Record of Local Contacts, Partners, and Meetings: Action Steps**

- *Maintain a database or card file of local contacts and community response partners.*
- *Maintain a log or ongoing record of phone calls, correspondence, meetings, and other forms of exchange with local contacts.*
  - ⇒ Use this log to record dates, times, places, and individuals involved along with their organizational affiliations, if any; also note key topics for discussion, agreements, conflicts, or issues ending in impasse.

debriefing sessions following the use of MRC volunteers. It will help you to redesign procedures that were less than effective. In addition, should you later need information about an engagement, all of the specifics will be recorded. You may also use that information to file incident reports, to the extent those are required or recommended among your community of partners.

Ideally, everyone involved in your MRC, including your partners, will be operating within a system of accountability in which responsibilities are clearly spelled out, realistic, and trackable. The information you collect can help determine if that is indeed happening.

### **Keeping a Record of Local Contacts, Partners, and Meetings**

Keeping a database or card file of local contacts and response partners may seem like a perfectly obvious thing to do. But to make the most of that database, we also suggest that you supplement it with a record or log of phone calls, correspondence, meetings, and any other form of exchange with these partners. The networking required of the MRC is substantial, and if there is no record of those contacts, much of the history of that relationship building can be lost, especially when there is a change in MRC leadership. A log of networking activities can function as a kind of history that can help others get quickly up to speed on what has led up to the current state of affairs.

The log doesn't have to be extensive, but it should be complete. It should give dates, times, places, and individuals involved, along with their organizational affiliation, if any. It should note key topics for discussion along with any agreements, conflicts, or issues ending in impasse. Such a record can also help partners reconstruct the process that lead to their current status, whether in the form of agreements or unresolved conflicts. Such a log or record can also function as a useful history of the MRC's progress—something that can be drawn upon for training and orienting new volunteers, as well as material with which to write funding proposals and other reports.

***Be clear about your rules of engagement.***

***Let everyone know as directly as possible what conduct you expect from your MRC volunteers.***

## **Establishing and Clarifying Policies**

A policy might be described as “the way we do things around here.” Even when policies aren’t formally written down, every organization operates with a set of them. We are always sending one another signals about how we expect one another to behave in a group or community. So in order to keep that kind of communication as clear as possible, it makes sense to be clear about our expectations and our “rules of engagement.”

The need for clear, understandable policies is especially important in complex operational environments such as the MRC. Your unit’s volunteers may in the course of their duties find themselves in a variety of difficult, even risky, situations. They will need the support that comes from well-defined policies and procedures related to volunteer activation, crisis communications, use of ID cards and special-issue badges, and incident reports and debriefing.

Whether written as general statements of principle or specific rules, policies help structure the procedures that will serve to actualize those policies. For example, an MRC may operate with a policy of harm reduction or of informed consent for the people it serves. The procedures related to those policies will therefore offer a set of steps for achieving them. Therefore, having a set of policies and corresponding procedures in place—and training everyone to know them—can help your MRC function most effectively as a team. Even more important, policies are intended to reduce the risk of harm and to reduce unnecessary, destructive conflict.

Establishing and communicating policies can be difficult and time consuming. It’s an ongoing task, since policies cannot be put in place and left to run on their own. And because the working situation for your MRC is likely to change over time, it is helpful to continually revisit whatever policies have been put in place to make sure that they still reflect the actual working conditions as well as your unit’s best thinking. The process of establishing policies and later clarifying or modifying them is cyclical. You will return to them over and over in an effort to make them the best possible.

Because the area of policies and procedures is extensive and one that has been well covered in a number of readily available books, we will focus in this booklet only on those

### Scope of Practice: Action Steps

- *State precisely what your MRC can and cannot do in its community role.*
- *Work with your local response partners to determine everyone's specific roles and responsibilities during drilling, utilization, and debriefing.*
- *Make sure your MRC's designated roles and responsibilities fit your mission; or, conversely, update your mission statement to reflect your actual roles and responsibilities.*
- *Remember that not everything your MRC is tasked to do is something an individual volunteer can do.*
- *Define clearly what qualifications are required in order for certain MRC volunteer activities to be undertaken by individual volunteers.*

aspects of policies and procedures that are most directly relevant to the MRC.

### Scope of Practice

“Scope of practice” refers to the range of activities that an individual or group is permitted to perform. In many cases, that scope will be fairly self-evident. For example, medical professionals are permitted to practice within a particular scope or range depending on their training. Similarly, a human services agency may be licensed to deliver certain services as determined by law, or may restrict its scope of practice to activities that support a particular mission or community focus. Restrictions on practice, therefore, can be imposed from both outside and inside the MRC. What's most important is that all parties involved understand the limits of their particular endeavors. To both ensure safety and reduce liability, it is important that no one acts outside his or her designated role or scope of practice.

### Determining Roles and Responsibilities With Partners

The activities of local MRC units can differ greatly because of the supplementary role those units are intended to play in their communities. This means that the larger part of what your MRC volunteers will eventually contribute will be determined by your local situation and, in particular, by how you and your response partners decide to work together.

Part of the planning process for your MRC will involve identifying partners with whom your volunteers might work cooperatively. MRC units supplement local public health and medical response capabilities, so much of what your volunteers do will depend on what is needed locally. This involves careful planning with your response partners to decide how your volunteers will be integrated into their existing systems, what your volunteers will be able to do and not do, and so on.

Everyone needs to be on the same page in terms of roles and responsibilities. This will ultimately determine the scope within which your volunteer corps will be able to practice.

### Your MRC Unit's Mission and Designated Tasks

Though we emphasize the importance of collaboration with community partners, we also want to note that there are always limits to what a given MRC unit will be able to offer its community. These limits are determined partly by your resources, but also by your MRC unit's mission and what you have set out to do.

During the process of planning, keep your unit's mission always in mind. What did you set out to accomplish? How can you accomplish that, given what your community partners need? Does your mission need to be updated to reflect a different understanding of the contribution required by your community?

Being clear about your MRC's mission and your MRC's self-defined scope of practice can help volunteers understand what is and what isn't expected of them.

### **Volunteer Training and Qualifications**

You can think about your MRC unit's activities as one part of the larger set of activities undertaken on behalf of emergency medicine and public health responsiveness in your community. In that larger picture, the MRC plays a specific and smaller supporting role. In a similar way, within the scope of all your MRC is tasked to accomplish, each volunteer will only undertake a subset of those activities. Not every volunteer is or ever will be qualified to do the same MRC-related work.

Part of volunteer orientation and training is developing skill sets as needed to enhance each volunteer's responsive capabilities. Equally important is being clear with each volunteer what she or he will be qualified to do based on prior experience and credentials, any additional specialty training, and readiness due to drilling with response partners. Guidelines will have to be written that cover the qualifications needed for each type of activity or role within the MRC. Individuals will need to understand what specific role they will play in a larger response effort, as well as the roles they will not be allowed to fulfill.

"Scope of practice" therefore applies to both the individual and organizational levels. It refers to the limit of practice allowed each individual volunteer, and to the range of activities your MRC agrees to perform in conjunction with your response partners. Everyone needs to know what his or her job does and doesn't entail.

### **Communication and Decision-Making Protocols**

Communications systems consist of both physical and informational components. But when it comes to procedural issues—such as whom to contact, when, and how—communication becomes a matter of policy, too. It is often necessary for information to flow through predetermined channels and in a designated sequence, especially when that information is vital to decision making.

### **Communication and Decision-Making Protocols: Action Steps**

- *Clearly articulate and convey the proper procedures for relaying information, making decisions, and giving/following orders.*
- *Practice drilling these communication, decision-making, and leadership protocols.*
- *Determine with your response partners which individuals or organizations are authorized to declare a local state of emergency, which official declaration may eventually activate MRC volunteer utilization.*
- *Designate the proper individuals or organizations who will be authorized to indicate when your MRC volunteers should take action and when they should cease.*

### **Chain of Command**

MRC units are organized according to different management models—some more hierarchical than others, some more egalitarian, some more formal, and so on. Whatever model your MRC favors, the leadership function will always have to be located somewhere in the organization. People need to know when and whom to follow, especially during times of volunteer utilization and community crisis.

In more formally organized units, this type of leadership is often referred to as the “chain of command.” The image of the chain is meant to suggest a relay, where orders or commands are passed down from upper to lower levels of management, and where information flows from the field back up to the top of the organization so that strategic decisions can be made. All along this chain or relay system, individuals are assigned roles that are intended to facilitate this flow of information and action.

Even in more loosely organized work teams, it will be essential that members of the team understand how authority and decision-making responsibilities flow through their system. That way, everyone clearly understands his or her part in the overall process and how that part is affected by those with whom the individual will be working most closely.

The expected procedures for relaying information, making decisions, and giving/following orders should be spelled out and included as a key component of training your MRC volunteers.

### **Declared and Undeclared Emergencies**

One of the many implications for the MRC working collaboratively with other community response partners is that the decision to utilize volunteers has to be arrived at either by a designated leader, by general agreement of the partners, or according to principles of activation laid out before there is a need to call out your MRC volunteers.

In the area of disaster management, for example, there exists the concept of the “declared” emergency for situations that have gone beyond the normal response capabilities in your community. A declared emergency is an official call for additional assistance in response to an extraordinary need. In practice, it may mean accessing resources at higher levels of government: a city may call for resources from the county, a county from the state, or a state from the Federal government. It may mean redistributing local resources, such as redirecting

substantial medical capabilities to address one particular health crisis. Or it may mean supplementing existing medical and public health capabilities, which is where MRC volunteers may come into the picture.

An official state of emergency is usually declared by an elected official, such as a governor or a mayor. The type of emergency or crisis situation may vary a great deal. It may involve, for example, a public health concern or epidemic, such as West Nile Virus or Severe Acute Respiratory Syndrome (SARS). It may take the form of a natural or human-made disaster.

Whatever the nature of the emergency, it is important to know which agency or office will assume the lead role in responding to the situation. That designated response leader will often, though not always, be the local emergency management office. Whatever the case in your community, that designated leader will ideally be named in your local emergency response plan. The lead agency or office will coordinate the efforts among other local or state agencies.

As we have already discussed, your MRC unit's response to various local emergencies or crises will depend on your scope of practice and on the needs of your response partners. As part of the planning effort, you will learn which individuals or offices are empowered in your locality to make the declaration of an emergency and which agencies or offices will take the lead in the event of such a declaration. The policies and procedures guiding your unit's efforts, as well as those of your response partners, ideally will be detailed in your local response plan.

Furthermore, all of these factors and specifics should be integrated into training and drilling your MRC volunteers. Doing so will further assure that your unit is complying with liability protection standards that require volunteer-based organizations to train their volunteers in accordance with all policies and procedures, especially those intended to reduce the incidence of harm.

#### **Authorization to Take Action and Notification to Cease**

All kinds of emergencies can strain your public health system or can require medical surge capacity. Conversely, some emergencies may not require medical or health volunteers at all. For the MRC, it's a matter of standing by to determine how a particular situation is developing and awaiting authorization to activate your volunteers according to plan. You don't want to "jump the gun" or

### **Legal Liability and Risk Reduction: Action Steps**

- *Find out everything you can about the laws in your area that govern volunteers, “Good Samaritan” acts, medical and health practices, and general liability.*
- *Seek legal counsel to determine the best policies and procedures to have in place to reduce the risk of harm and legal liability for your volunteers and your organization, given your local laws.*
- *Don't hesitate to implement policies and procedures that exceed your community-set standards. Be a leader in reducing risk of harm in your community.*
- *Train your volunteers to understand the importance of these liability and risk reduction policies and procedures. Make sure they understand concretely how to implement them.*

base your deployment decisions on information coming from unreliable sources.

Once a situation has been determined to be one in which MRC utilization is appropriate, volunteers still will have to be notified of the need for their particular services. Different community situations may require very different responses from the MRC. You will want to avoid situations where volunteers take action based on their own initiative, without authorization from their MRC unit.

Likewise, it is important that volunteers be notified promptly and clearly when their services are no longer needed. This is critical because sometimes, once the need for early “surge capacity” support has passed, volunteers still on the scene can interfere with the normal operations of their partnering organizations, which can lead to unwarranted harm.

Having in place a mechanism for deactivating volunteers is important as a way to help the overall response effort function most smoothly and safely. Again, we want to reiterate that all of these specifics should be integrated into training and drilling your MRC volunteers.

### **Legal Liability and Risk Reduction**

Different localities are subject to different legal liability laws and standards. So we urge you to seek local legal counsel to help you understand the legal and professional guidelines affecting your MRC volunteers and your organization.

Once you understand the specifics governing and in some cases restricting volunteer activities, especially for medical and health professionals, it will be important to include these in your policies and as part of training your volunteers. You will likely have informed your volunteer prospects of the risks that may be associated with their work for the MRC. Once they join your team, however, you will want to help them understand the specifics of legal and professional standards under which they will be operating.

Over and above those technical details—which are important to know and understand—it is equally important to realize that liability laws, in principle, are intended to protect citizens from negligent or faulty behavior on the part of individuals or organizations, which negligent or faulty behavior then leads to unintended harm. What this means in practice is that efforts to protect your MRC volunteers from liability risks will also reduce the unintended harm they might cause those they are truly meaning to help. These harm reduction measures and

principles will become part of your policies and procedures that volunteers are trained to understand and implement.

While thinking about the principles that underlie risk reduction, you may discover ways of reducing risk that exceed the standards normally required in your community or state. Implementing additional risk reduction measures can only benefit everyone involved. Don't hesitate to be a leader in promoting risk and harm reduction in your community, if you have that contribution to make.

In general, the effort you put into developing and communicating those operating policies and procedures will also help reduce the harm that might otherwise arise from a less thoughtful or under-planned utilization of your volunteers.

### **Grounds for Dismissal From the MRC**

Firing someone is rarely a pleasant duty, but unfortunately it may be necessary at times for the well-being of the MRC unit. It is particularly important that a volunteer's behavior not compromise the safety of other volunteers, response partners, or community members. In order to dismiss a volunteer from service, it is important that the grounds for dismissal be clearly communicated in advance of the behavior. There are cases when volunteers, like any of us, make mistakes simply because they didn't know better. It is unfair to penalize them after the fact without first having given them a chance to demonstrate their willingness to follow clearly laid-out rules or codes of conduct.

Just as volunteers need to know what their duties are, they also need to know what is unacceptable by way of conduct while they carry out those roles and responsibilities.

In your MRC unit, what behaviors will be considered categorically unacceptable? What behaviors will merit a warning or some form of probationary period? What behaviors will require a neutral third-party mediator to determine their severity? You will want to spell out the answers to these questions up front and include this information in your training so that everyone understands the ground rules and knows what is and isn't acceptable behavior.

#### **Grounds for Dismissal From the MRC: Action Steps**

- *Spell out simply and clearly what behaviors will constitute grounds for dismissal of a volunteer from the MRC. Safety, in particular, cannot be compromised.*
- *Determine which behaviors will result in immediate dismissal, which ones will merit a warning or other probationary period, and which ones will require the judgment of a neutral third party to determine their severity.*



***Make planning—strategically, financially, and operationally—a regular part of your unit's internal administrative tasks and culture.***

### ***Planning and Revisiting Strategic Priorities: Action Steps***

- *Establish objectives that support your mission and that meet the needs of your community. Revisit those objectives periodically to determine if they are still strategically on target.*
- *Keep a log or record of progress toward your objectives that includes: key events; target and completion dates where appropriate; any changes in those objectives and the reasons for the changes; as well as the process that led to abandoning an objective before completion.*
- *Keep a record or log of accomplishments that are important to your MRC, even if they weren't part of your formal plan.*
  - ⇒ *These can be used as success stories when promoting your MRC.*

## **Planning and Revisiting Strategic Priorities**

A certain amount of planning is necessary when first starting an MRC unit. Even more planning will be required with response partners as part of a larger coordinated response effort in your community. As that community context evolves, MRC units will require a renewed sense of strategic priorities in order to steer through the complexity that is likely to emerge. As such, planning—strategically, financially, and operationally—will likely be a regular part of your unit's internal administrative tasks, not something done once a year.

Establishing objectives for your unit will be important. Those objectives should support your MRC's mission as well as meet the needs of your overall community. Reporting on progress toward your objectives will also be a critical part of communicating your MRC's success to local partners and other support organizations, including funders. We recommend that you keep track of key events culminating in the completion of your objectives, including target and achieved dates where appropriate. Some activities, like volunteer recruitment and training, will be ongoing. Nonetheless, we encourage you to keep a log of significant events that will constitute your MRC's history.

Objectives can change, too, in the course of actualizing them. In that case, note the reason for the change and keep records of how the objectives were then either amended or abandoned.

You may also find it helpful to note accomplishments of importance to your MRC that may not have been part of your formal plans. These too will become part of your MRC's story and a part of the material you use to get others excited about your venture.

One particular kind of accomplishment is acquiring or leveraging of resources. Some of these resources may be in the form of funds, in-kind donations, volunteered expertise, shared resources with response partners, etc. Again, this is information that can be used when soliciting further resources from potential funders and other community champions in order to fill the gaps in your resource needs.

Once you've made and are following a plan, you may find it helpful in the long run to keep a running record of all events that are pertinent to the execution of that plan—whether it be strategic, financial, or operational. So much can happen in the course of an MRC unit's year that it can become more than a single mind can hold. Documentation can support a collective memory even as it strengthens your efforts to broadcast your MRC's successes.

*Consider every activity of your MRC in terms of its potential for supporting your unit's long-term viability.*

*All of your efforts can work together toward that objective.*

## **Working Toward Long-Term Sustainability**

The easiest time to hold onto a sense of mission is during and immediately following a crisis. There's nothing like adversity to pull a community together.

But for all the good that can come from our spontaneous efforts to join forces in times of need, we can still improve our response capabilities by planning ahead and putting in place a response system that can be responsibly activated during a crisis.

One of the challenges faced by the MRC is keeping the effort viable as an ongoing, national volunteer movement when our communities are not facing emergencies. The long-term sustainability of the MRC does more than just support emergency or crisis activation. The MRC can also contribute to the ongoing health needs of our communities. The MRC can become a way to support medical and health volunteerism throughout the year and in years to come.

Ideally, everything you do to support coordination with local response partners, to develop your volunteers' capabilities, and to establish a solid internal organization will contribute invaluable toward the long-term sustainability of your MRC. Yet from an organizational and administrative point of view, two issues are key to those different efforts: keeping your sense of mission and community contribution sufficiently broad; and securing the resources you will need to keep your organization up and running over time.

### **Diversifying Your MRC's Activities**

We've discussed the importance of having a mission for your MRC as well as the need to keep your mission focused enough to match the limits of your available resources. You don't want to spread yourself too thin. At the same time, you don't want to think of your MRC so narrowly that it eventually squeezes all the creative life from it. Instead, it is necessary to

### ***Diversifying Your MRC's Activities: Action Steps***

- *Think in terms of both public health and emergency response, even if your MRC focuses on only one or the other.*
- *Have your MRC join already existing public health and emergency preparedness initiatives. Find out if your MRC can benefit from some of the resources already allocated to those initiatives.*
- *Establish links with vulnerable segments of your community (i.e., people with disability needs, groups with limited English-language proficiency, low-income neighborhoods, etc.). Such groups will have special needs during both routine and crisis periods.*
- *Consider the MRC's possible role in already existing organizations (professional schools, training efforts for medical and health professionals, professional organizations, etc.).*
- *Encourage affiliation among your volunteers.*

Keep your sense of mission and community contribution sufficiently broad.

You don't want it to become so narrow that you lose relevance and vitality.

At the same time, recognize the importance of keeping a focus and not spreading your resources too thin.

balance the tension between holding a focus and expanding the relevance of your MRC to the community it serves.

One of the first ways to do this is to think of the MRC from the perspective of both emergency response and public health. That is, even though your MRC may focus primarily on one or the other, consider that there may be needs in your community for both. Being able to address both also can help your MRC stay connected to the ongoing, routine requirements of your community as well as your community's more intense undertakings. Both are important ways of participating in the life of your community.

There are several approaches to adopting a more diversified view of your MRC's activities. For example, you can find ways to join already existing medical or health projects. In particular, you might connect with public health or medical initiatives underway in your community even before your MRC was formed. This helps to demonstrate responsiveness to community needs in a way that will also enhance public perception of the MRC and allow your MRC to benefit from resources that may already be earmarked for those initiatives.

To expand on this concept further, it can also be productive to establish links with vulnerable segments of the community (disability needs, groups with limited English-language proficiency, low-income communities, etc.), since many of these groups can be served during non-emergency times and will also have unique requirements during crises and other disasters.

It is possible to position your MRC in such a way that it can be integrated into existing organizational structures or programs, such as opportunities for students in professional schools who might need local internships, as part of professional training related to emergency response or public health efforts, and as part of the activities of local professional organizations.

Developing an organizational culture of responsiveness to community needs and of actively linking to those needs will also send a positive message to your volunteers. It can encourage them to develop their own social

### **Leveraging Public and Private Sector Resources: Action Steps**

- *Develop a budget that clearly specifies what you will need in order to accomplish your objectives and what resources will be required to achieve them.*
- *Share your budget, as appropriate, with funders, community champions, response partners, and others who might help bring resources to your MRC effort.*
- *Diversify your stream of resources so that if one dries up, you still have other options to tide you over while you cultivate new resources.*
- *Consider multiple resource types: funds, in-kind donations of goods and services, contributions of specialty knowledge, etc.*
- *Keep government officials apprised of your MRC's progress. Local government funds may also be available for your MRC.*
- *Find out if your response partners have access to resources that you need and that they can afford to part with or share.*

network within the MRC. When volunteers—like members of any organization—also develop collegial and social relationships with their peers, those ties can go a long way toward strengthening volunteer commitment to the MRC. And that in turn conserves and strengthens one of your unit's most important resources: your volunteer corps.

In summary, all of your MRC activities can contribute to establishing the MRC as part of your community's shared vision for public health and emergency response. Help others in your community understand how the MRC's contribution can become part of what makes their homes, workplaces, and neighborhoods safer, healthier, and better prepared.

### **Leveraging Public and Private Sector Resources**

Leveraging public and private sector resources is an administrative activity that involves a special kind of networking, but not with the objective of directly facilitating volunteer utilization. Rather, these additional networking responsibilities may involve keeping local officials abreast of your unit's work, as well as writing grants and other solicitations of funds and resources.

In various ways, the unit's coordinator or director will function as an ambassador to strengthen the unit's foundational administrative structure. Meeting and office space may need to be secured, if not through funds then through in-kind donations. Additional staff, supplies, and equipment may be needed. As always, the emphasis will be on asking others to support the highly complex work of utilizing medical and public health volunteers in a coordinated fashion.

In the initial stages of planning and forming your MRC, you probably developed a budget showing what would be required to support your mission, its primary objectives, and the activities necessary to achieving those objectives. Budgeting is not only an ongoing administrative responsibility; it constitutes a form of information that also helps others understand how you plan to operationalize your vision with fiscal responsibility. Even if you use that information to demonstrate how you have historically performed that responsibility, communicating with others about your resource budget and needs can go a long way toward strengthening your credibility. It can help others understand concretely not only what they are

contributing to but what exactly you need that they might be able to offer.

When soliciting grant or foundation funds, for example, you are typically asked to provide budgetary information in your application, both expenses and anticipated sources of revenue or other resources. Obviously, funders will want to see that your anticipated resource needs are in line with your proposed activities. Funders also may show increased willingness to invest in an effort that is widely diversified in terms of resources, and that demonstrates that others have also bought into your idea or vision by contributing to it.

Diversification of resources is accomplished in two principal ways: through resource streams; and through resource types.

By diverse resource streams, we mean having as many sources of incoming resources as possible. This has the strategic utility of demonstrating widespread support for your effort, as we discussed previously in this booklet. Of even more practical importance, diversifying resource streams means that if one “dries up,” your MRC can more easily adapt to that change without having to deal with the level of crisis that ensues when an organization loses its primary resource stream. This strategy of diversification is well known to nonprofit organizations.

To give an example, your MRC may have been seeded with funds from a single source to begin with, perhaps from the Federal government or as part of a state-run program. If so, you may already have considered the advisability of identifying other funding sources for the future, especially if the support from the first donor is for a limited time.

With regard to resource types, it is important to remember that revenue does not always take the form of funds. Many of your unit's needs may also be met by creative forms of resource acquisition. As you may already know, “in-kind donations” can mean anything from receiving actual goods or supplies to making use of someone's time and services. For example, individuals in your community may have bookkeeping or software programming skills you need on an ongoing, part-time basis. They may be willing to offer it to you for free or at a significantly reduced cost. A computer or other office equipment may be donated by companies that have upgraded to newer machines. Local media may be willing to broadcast your public relations messages for free; communications professionals may be willing to develop your materials at cost. The possibilities are limitless.

By being able to show funders, partners, and community champions what you are striving to accomplish, as well as

what you may need to support those accomplishments, they may be able to help you acquire those resources, of whatever type.

Promoting the success of your MRC may require multiple champions. Some of these may be paid MRC staff, particularly those who manage daily operations. Others, particularly those in positions of community leadership, may donate their time to the MRC. Some units even benefit from charismatic volunteers who, in addition to other contributions, are willing to function as spokespersons for the MRC. Local government officials, too, may understand how the MRC helps them achieve their visions for community well-being and therefore may be willing to mention the MRC in public appearances and to solicit resources actively on the MRC's behalf. This underscores the importance of keeping local officials well informed of your MRC's efforts and progress and involving them in planning as appropriate. Local government budgets may also be sources of funding support for your MRC.

Another way of leveraging resources is to explore how to use some of the resources your response partners may already have access to. These might include funding streams that have been designated for certain kinds of activities that your MRC volunteers perform, or specialty expertise in law or training, or even existing training opportunities that your volunteers can access at little or no extra charge.

A list of potential partners can be found on the Medical Reserve Corps Web site at [www.medicalreservecorps.gov](http://www.medicalreservecorps.gov). Your local Citizen Corps Council may also be able to help you with partnering and resource opportunities.

### **Supporting Your Cause With Evaluation Data**

You may be aware of the push across all sectors of public service for demonstrating measurable outcomes. Funders and tax payers alike want to know that their contributions have indeed resulted in the outcomes that were initially planned. No one wants to support a losing effort. As such, there may be a demand for numbers and other hard facts to prove "results." You may find that some response partners respond more positively to your clearly laid out budget than to your visioning statement. On the other hand, some people operate with looser frameworks and don't particularly connect to numbers. However, nearly everyone responds well to demonstrations of responsible stewardship. So it is a good idea to develop a repertoire of ways to show how your MRC is being successfully managed and utilized.

#### **Supporting Your Cause With Evaluation Data: Action Step**

- *Develop a repertoire of ways of demonstrating your effective stewardship of your MRC: success stories, financial statements, progress reports, volunteer statistics, etc.*

One of the simplest forms of reporting is to compile and broadcast your success stories. This is why we encouraged you earlier to keep track of what your unit is doing and particularly what it is accomplishing. No matter how small your steps forward, those steps can be used for recruitment, media coverage, and for updating local officials, partners, and other community champions. Narratives appeal to a great many people and often motivate them to action. They are a compact form of communicating your MRC's success and role in the community. Narratives can also serve as a support to more quantitative reports of success.

Another form of evaluating program success is simply to establish objectives and plans for their achievement along with a timeline, and to institute a review process to determine progress in those particular areas. The results of that review then become useful for reporting unit progress to other interested parties. Objectives can cover any number of operational areas of your MRC: partnering, volunteer recruitment and training, activation plans, drilling, database development, fundraising, and so on.

Keeping track of volunteer statistics (see the previous section on databases for more information) is also crucial to demonstrating program accomplishments in concrete terms. Having access to that kind of data can help support your requests for funds or other support because it demonstrates factually what your volunteers are contributing by way of in-kind services to their communities. Eventually it will help to know what MRC volunteers have actually saved your community, in terms of expense, by simply multiplying their donated hours by their normal professional rates. The results are likely to be impressive and to make a great case for leveraging further funds and resources.

**Develop a 3- to 5-year plan for securing the resources you will need to keep your organization functioning into the future.**



## Action Steps Checklist

The checklist of possible “action steps” below follows the basic outline of this particular technical assistance topic. Remember: these are only suggestions. We offer them as a quick reference guide and as something to stimulate your own thinking through some of the complexities you may face in your MRC unit. You may choose to follow a different approach. If so, we hope you’ll share your “best practices” as you go along. We all have a lot to learn.

### INTRODUCTION

- Attend carefully to your internal organizational needs, even as you devote substantial resources to external coordination and volunteer relations.
  - ⇒ *A healthy, well-run organization is the foundation of every successful MRC unit.*

### TRACKING AND UPDATING INFORMATION

- Determine what information you will need over the course of managing your MRC unit. Then, set up a system to track it as easily as possible.

#### Developing a Volunteer Database

- Determine what you want your database of volunteer information to do. What outputs and reports will you need? What functions must they perform?
- Design your database to include the information you will need to collect in order to fulfill those functions or outputs.
  - ⇒ *Balance between anticipating future information needs and building a system that overly exceeds your near-term needs.*
- Choose a database format—paper or computer-based—that fits your needs for data entry and retrieval, as well as your available resources.
  - ⇒ *Find out if your data and system will need to be compatible with that of your local response partners.*
- Decide what data you will need to collect from prospective volunteers before you begin interviewing them.
- Design your volunteer application forms so that they are easy to fill out and so that it is easy to transfer their data into a computer system (if that’s the format you choose to use).

#### Establishing a System for Identification

- Work with local response partners to determine the most useful information to include on your MRC volunteers’ ID cards.

- ⇒ *At a minimum, you will probably want a recent photo, full name, signature, an identification number, and the name of your MRC unit.*
- ⇒ *For cross-validation purposes, consider including numbers from a driver's license or from other professional credentials.*

- Find out if there is a system of identification already in use locally or at the state level.
- Determine with local response partners what information to include on MRC ID cards in order to quickly signal a volunteer's professional training and other necessary credentials or qualifications.
- Choose a method of producing the card that is secure so that IDs cannot be easily made or duplicated without authorization.
- Remember not to confuse an ID card with any of a number of different badges that may be utilized by your response partners in the event of an emergency or other utilization of MRC volunteers.
- Update IDs to match changes in a volunteer's profile or to reflect changes in the information system used among your response partners.
- Ask for the return of IDs when volunteers are no longer active members.

### **Collecting Engagement and Utilization Data**

- Develop a volunteer activity tracking form.
- Use that form to keep track of the number of hours your volunteers put into their MRC activities. Break those numbers down by type of activity and by professional background.
- Use that form to keep track of the professional backgrounds or skills sets represented by your volunteer corps.
- Develop an engagement or utilization form that will help you keep track of the information you might want to consider later, when improving your system or filing an incident report.
- Use that form to keep track of the details of particular volunteer engagements or utilization, including drilling exercises.
  - ⇒ *Note the circumstances involved in deployment or utilization, the sequence of events from start to finish, the names of other organizations involved along with their roles and actual participation, difficulties encountered with respect to communication or other systems of activation, procedures that proved notably effective, resources consumed in the course of the engagement, along with resources that could have been useful and resources that were unnecessary, etc.*
- Use your engagement and utilization data during follow-up debriefings with volunteers and response partners as a way to improve response efforts the next time.

### Keeping a Record of Local Contacts, Partners, and Meetings

- Maintain a database or card file of local contacts and community response partners.
- Maintain a log or ongoing record of phone calls, correspondence, meetings, and other forms of exchange with local contacts.
  - ⇒ *Use this log to record dates, times, places, and individuals involved along with their organizational affiliations, if any; also note key topics for discussion, agreements, conflicts, or issues ending in impasse.*

## ESTABLISHING AND CLARIFYING POLICIES

- Be clear about your rules of engagement. Let everyone know as directly as possible what conduct you expect from your MRC volunteers.

### Scope of Practice

- State precisely what your MRC can and cannot do in its community role.
- Work with your local response partners to determine everyone's specific roles and responsibilities during drilling, utilization, and debriefing.
- Make sure your MRC's designated roles and responsibilities fit your mission; or, conversely, update your mission statement to reflect your actual roles and responsibilities.
- Remember that not everything your MRC is tasked to do is something an individual volunteer can do.
- Define clearly what qualifications are required in order for certain MRC volunteer activities to be undertaken by individual volunteers.

### Communication and Decision-Making Protocols

- Clearly articulate and convey the proper procedures for relaying information, making decisions, and giving/following orders.
- Practice drilling these communication, decision-making, and leadership protocols.
- Determine with your response partners which individuals or organizations are authorized to declare a local state of emergency, which official declaration may eventually activate MRC volunteer utilization.
- Designate the proper individuals or organizations who will be authorized to indicate when your MRC volunteers should take action and when they should cease.

### Legal Liability and Risk Reduction

- Find out everything you can about the laws in your area that govern volunteers, "Good Samaritan" acts, medical and health practices, and general liability.

- Seek legal counsel to determine the best policies and procedures to have in place to reduce the risk of harm and legal liability for your volunteers and your organization, given your local laws.
- Don't hesitate to implement policies and procedures that exceed your community-set standards. Be a leader in reducing risk of harm in your community.
- Train your volunteers to understand the importance of these liability and risk reduction policies and procedures. Make sure they understand concretely how to implement them.

### **Grounds for Dismissal From the MRC**

- Spell out simply and clearly what behaviors will constitute grounds for dismissal of a volunteer from the MRC. Safety, in particular, cannot be compromised.
- Determine which behaviors will result in immediate dismissal, which ones will merit a warning or other probationary period, and which ones will require the judgment of a neutral third party to determine their severity.

## **PLANNING AND REVISITING STRATEGIC PRIORITIES**

- Make planning—strategically, financially, and operationally—a regular part of your unit's internal administrative tasks and culture.
- Establish objectives that support your mission and that meet the needs of your community. Revisit those objectives periodically to determine if they are still strategically on target.
- Keep a log or record of progress toward your objectives that includes: key events; target and completion dates where appropriate; any changes in those objectives and the reasons for the changes; as well as the process that led to abandoning an objective before completion.
- Keep a record or log of accomplishments that are important to your MRC, even if they weren't part of your formal plan.

⇒ *These can be used as success stories when promoting your MRC.*

## **WORKING TOWARD LONG-TERM SUSTAINABILITY**

- Consider every activity of your MRC in terms of its potential for supporting your unit's long-term viability. All of your efforts can work together toward that objective.
- Keep your sense of mission and community contribution sufficiently broad. You don't want it to become so narrow that you lose relevance and vitality.

⇒ *At the same time, recognize the importance of keeping a focus and not spreading your resources too thin.*

- Develop a 3- to 5-year plan for securing the resources you will need to keep your organization functioning into the future.

### **Diversifying Your MRC's Activities**

- Think in terms of both public health and emergency response, even if your MRC focuses on only one or the other.
- Have your MRC join already existing public health and emergency preparedness initiatives. Find out if your MRC can benefit from some of the resources already allocated to those initiatives.
- Establish links with vulnerable segments of your community (people with disability needs, groups with limited English-language proficiency, low-income neighborhoods, etc.). Such groups will have special needs during both routine and crisis periods.
- Consider the MRC's possible role in already existing organizations (professional schools, training efforts for medical and health professionals, professional organizations, etc.).
- Encourage affiliation among your volunteers.

### **Leveraging Public and Private Sector Resources**

- Develop a budget that clearly specifies what you will need in order to accomplish your objectives and what resources will be required to achieve them.
- Share your budget, as appropriate, with funders, community champions, response partners, and others who might help bring resources to your MRC effort.
- Diversify your stream of resources so that if one dries up, you still have other options to tide you over while you cultivate new resources.
- Consider multiple resource types: funds, in-kind donations of goods and services, contributions of specialty knowledge, etc.
- Keep government officials apprised of your MRC's progress. Local government funds may also be available for your MRC.
- Find out if your response partners have access to resources that you need and that they can afford to part with or share.

### **Supporting Your Cause With Evaluation Data**

- Develop a repertoire of ways of demonstrating your effective stewardship of your MRC: success stories, financial statements, progress reports, volunteer statistics, etc.