



Digital Volunteer Program Guide

Science and Technology Directorate

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Building a Digital Volunteer Program

The purpose of the Department of Homeland Security (DHS) Science and Technology Directorate (S&T) Digital Volunteer Program Guide (Guide) is to provide step-by-step guidance on developing a digital volunteer program to support emergency responders. Digital Volunteers are trained, “trusted agents” with experience in social media emergency management (SMEM) operations that provide digital surge support to an agency during an incident. This Guide is intended for organizations that seek guidance on launching and maximizing the benefits of a digital volunteer program. The Guide consists of **two resource** sections and instructions for **two templates**, which support the development of a Digital Volunteer program (Figure 1). Best practices from practitioners successfully integrating digital volunteers into regular operations are included throughout the Guide. **Users are encouraged to download, complete and/or modify the templates in a way that suits their organization’s needs.** Blank Word versions of the templates are available on request at first.responder@hq.dhs.gov.

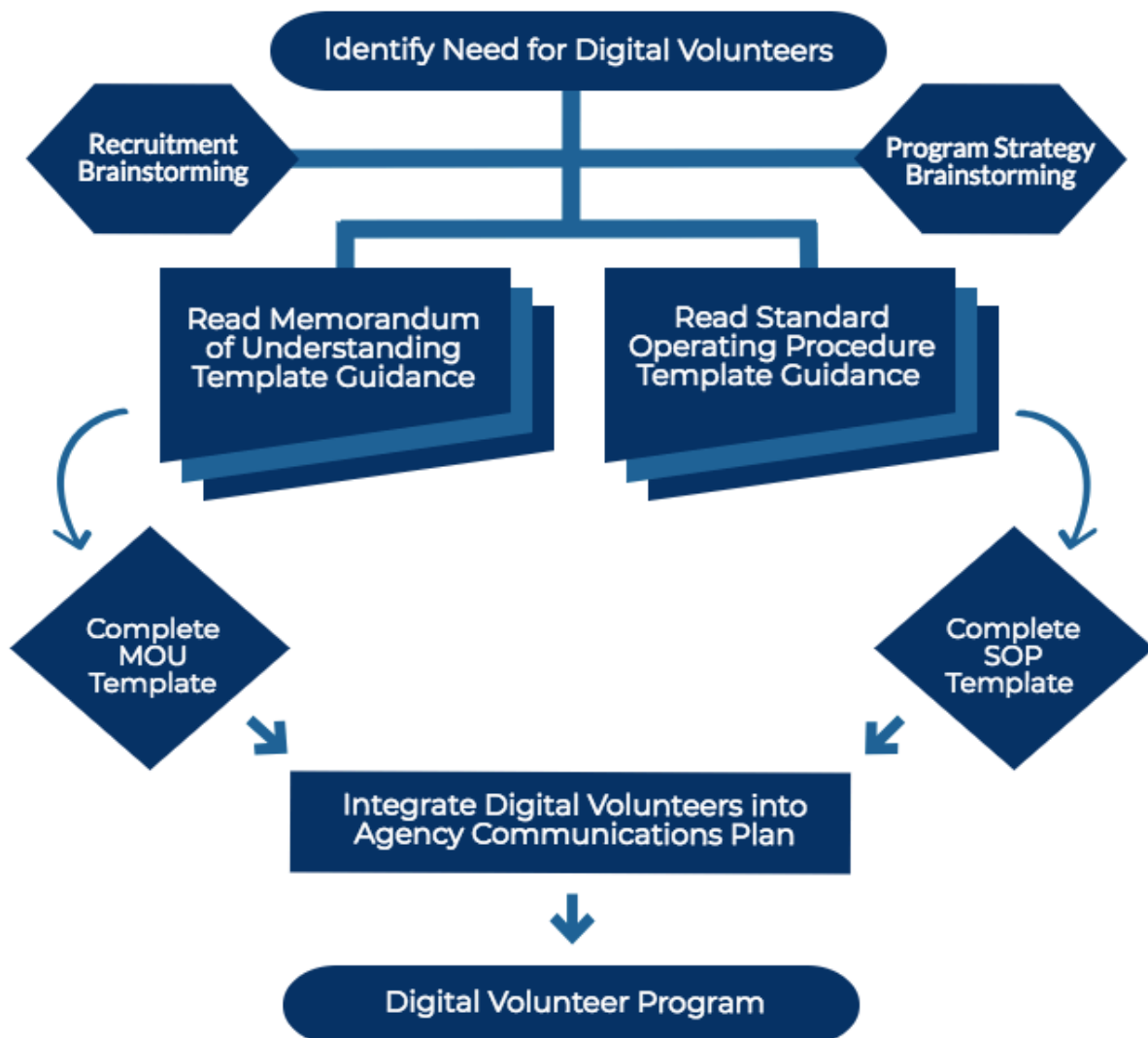


Figure 1: Digital Volunteer Program Guide Flowchart

1.0 How to Develop a Digital Volunteer Program Strategy

This step outlines the major strategy and policy considerations one should consider prior to pursuing a digital volunteer program or partnership with a digital volunteer organization. User considerations in the following sections directly inform completion of the Digital Volunteer Memorandum of Understanding (MOU) Template on page 27 and Standard Operating Procedure (SOP) Template on page 30. **Users are encouraged to download, complete and/or modify these templates in a way that suits their organization's needs.**

1.1 Objectives and Desired Outcomes

Setting objectives helps to focus digital volunteer efforts. It is important from the outset to determine: the level of effort and expertise needed, direct volunteer activities, and how to measure progress. The following questions provide users with considerations prior to crafting digital volunteer objectives and identifying desired outcomes:

1. What are you hoping to achieve by engaging digital volunteers? (e.g., enhanced situational awareness, identification of misinformation, address public complaints)
2. Which incident priorities will digital volunteer objectives support?
3. What are the volunteer knowledge, skills and abilities needed to achieve your digital volunteer objectives?

For additional guidance defining social media objectives, see the S&T Social Media Business Case Guide (Section 1.1) available at <https://www.dhs.gov/science-and-technology>.

Example Incident Types to Engage Digital Volunteers

Planned Incidents: Sporting events (e.g., Super Bowl, X Games), Presidential debates, public education campaigns (e.g., severe weather preparedness), humanitarian efforts (e.g., Libya Crisis)

Unplanned Incidents: Severe weather (e.g., earthquake, wildfire, flood, hurricane, tornado), human-initiated events (e.g., active shooter)

1.2 Governance

An effective digital volunteer governance model supports organizational objectives and the coordination of information sharing across multiple, diverse stakeholder groups. The following sections provide users with considerations prior to selecting a digital volunteer governance model that best meets organizational needs.

Common Roles and Responsibilities

The majority of digital volunteer governance models use variations of the following roles and accompanying responsibilities:

- **Incident Decision Makers:** Key leadership at the incident level responsible for the overall management of the incident (e.g., Incident Command, Unified Command, Public Information Officer (PIO), Safety Officer, Liaison Officer).

- **Agency Volunteer Manager:** In coordination with Incident Decision Makers, the Agency Volunteer Manager defines the mission, confirms informational objectives, activates volunteers for missions and coordinates with the Volunteer Team Lead through all deployment stages. The Agency Volunteer Manager may be a key Incident Decision Maker, Incident Command Staff or internal staff from the organization.
- **Agency Training Coordinator:** The Agency Training Coordinator oversees the design of volunteer training materials, training coordination pre- and post-deployment, and measurement of training effectiveness. Some organizations assign the role of Agency Training Coordinator to one individual, while others share the role among multiple people (e.g., Incident Command Staff, Volunteer Team Leader(s), trusted Team Members).
- **Volunteer Team Leader:** In coordination with the Agency Volunteer Manager, the Volunteer Team Leader manages selected Team Members to achieve the established mission and objectives. A Team Leader should understand organizational objectives and all the social media platforms volunteers will use to support the objectives. Some practitioners identify more than one Volunteer Team Leader from within their organization or region to ensure social media efforts are sustained 24/7. Team Leader responsibilities can include, but are not limited to:
 - Identifying and selecting available volunteers with the right skills sets;
 - Assigning tasks to volunteers;
 - Managing all volunteers throughout deployment;
 - Communicating progress to the Agency Volunteer Manager; and
 - Alerting the Agency Volunteer Manager of any concerns, with recommended solutions.
- **Team Members:** Digital volunteer Team Members contribute to accomplishing an agency's established mission and objectives through unique skill sets. Typically, these trusted agents include colleagues from within an agency (e.g., PIOs, Emergency Managers (EMs), administrative staff), colleagues from within a discipline (e.g., fire, law enforcement, medical services), EMs or PIOs working in a region, or partner organization staff. For more information on the skill sets and success traits of effective digital volunteer Team Members, see "How to Recruit Digital Volunteers" (Section 2).

Common Governance Models

Virtual Operations Support Team (VOST) Model

In the VOST Model, emergency management agencies typically request the formation and/or support of a team made up of both local and non-local trusted agents (see Figure 2). A Team Leader oversees the volunteers and interacts directly with a VOST Manager, typically within the Joint Information Command (JIC) or Emergency Operations Center (EOC) Emergency Support Functions (ESFs). The VOST Manager is generally an EM or PIO. For more information on

implementing VOST for SMEM and related trainings, visit the [Virtual Operations Support Group \(VOSG\)](#) and [Virtual Emergency Management Association \(VEMA\)](#).^{1,2}

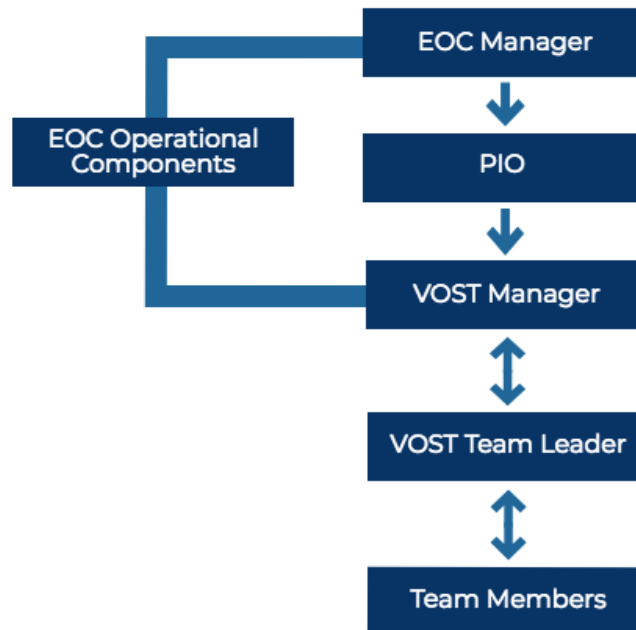


Figure 2: VOST Organizational Chart

Repurpose Existing Volunteer Models

Organizations may choose to leverage existing volunteer programs, such as Community Emergency Response Teams (CERT) or Amateur Radio Emergency Service (ARES), to also provide SMEM surge support. If an organization already works with a local CERT or ARES group, repurposing those volunteers for additional missions could save time and resources.

- CERT offers a consistent, nationwide approach to volunteer training that aligns to the principles of the Incident Command System (ICS). CERT volunteers have hands-on experience, participate in regular training and want to help respond to hazards. For more information on how to organize and deploy CERT resources, visit the Federal Emergency Management Agency's (FEMA) [CERT Basic Training Participant Manual](#).³
- ARES groups work with state and local governments to provide communications support during disasters and often have the right qualifications to support SMEM operations. Many of the groups already have existing MOUs that could be amended to include SMEM. For more information on how to organize and deploy ARES resources, refer to the [ARES Manual](#).⁴

¹ "Virtual Operations Support Group - About." *Virtual Operations Support Group*, <https://vosg.us/about/>. Accessed 6 June 2018.

² *Virtual Emergency Management Association*. VEMA, <http://www.virtualema.org>. Accessed 12 June 2018.

³ "CERT Basic Training Participant Manual." *FEMA*, January 2011, <https://bit.ly/2JQolrY>. Accessed 11 June 2018.

⁴ "Amateur Radio Emergency Service Manual." *The National Association for Amateur Radio*, March 2015, <https://bit.ly/2MEVVpt>. Accessed 12 June 2018.

Regional Model

In this model, an Agency Volunteer Manager informally requests SMEM surge support from colleagues within their region to develop a digital volunteer team. Regional models are dependent upon historic regional coordination in an area (e.g., National Capital Region), in addition to the size or complexity of the incident. For example, a PIO within a JIC responding to an incident would contact neighboring PIOs to supply available volunteers for an agreed upon mission and timeframe. This model is flexible and may take many forms (Figure 3), as it relies heavily on pre-established relationships within a region.

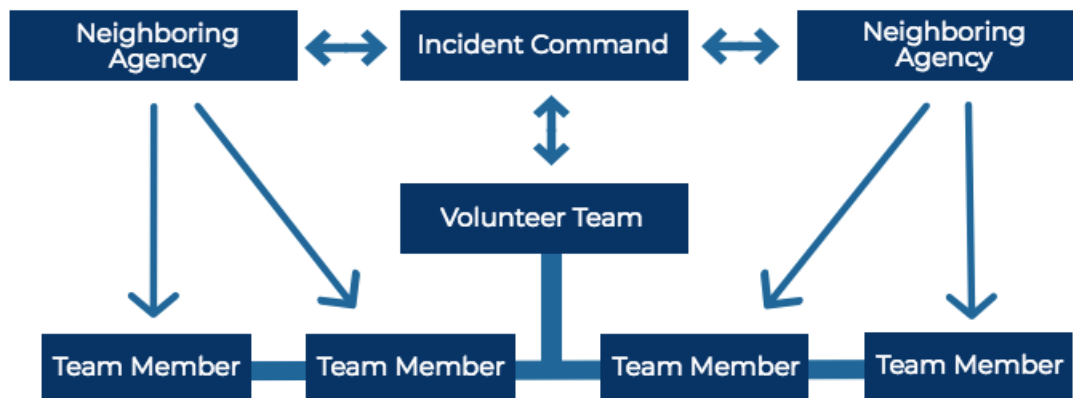


Figure 3: Regional Model

Partnerships Model

In the Partnership Model (Figure 4), an agency partners with an outside institution for digital volunteer surge support. Non-governmental and voluntary organizations (e.g., American Red Cross, Humanity Road, National Voluntary Organizations Active in Disasters) assist in providing specialized SMEM services, typically to support response and promote recovery through the EOC.

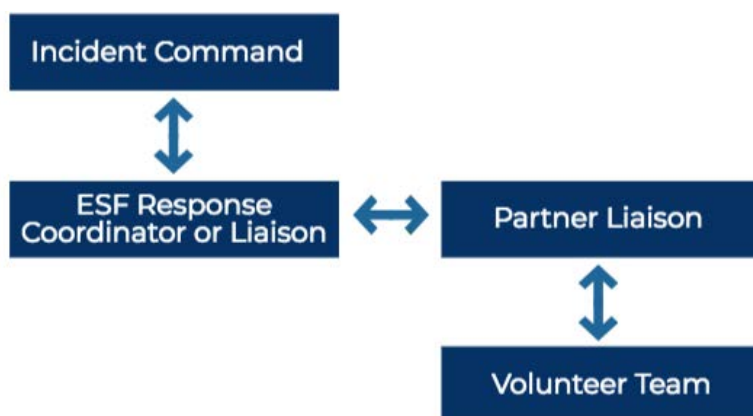


Figure 4: Partnerships Model

For more information on determining the best placement for social media within ESFs and incident command structures, see the S&T Social Media Working Group for Emergency Services

and Disaster Management (SMWG) Report “[From Concept to Reality: Operationalizing Social Media for Preparedness, response, and Recovery](#).”⁵

Characteristics of Effective Volunteer Programs

Effective digital volunteer programs facilitate coordination and information sharing among diverse participants to meet defined objectives throughout an incident. The following characteristics are typical of effective digital volunteer programs:

- **Documented Roles and Responsibilities:** Formally define roles and responsibilities through SOPs and MOUs, or through informal volunteer materials with explicit instructions (e.g., a handbook). Relationships grounded in clear expectations, policies or agreements leave little room for misinterpretation of processes and procedures (e.g., activation protocols, consistent training), allowing for better utilization and management of digital volunteers. It is also recommended that digital volunteers sign a service agreement acknowledging their role in assisting the organization. Refer to the [Colorado VOST Volunteer Service Agreement](#) for an example template.⁶
- **Meeting Cadence:** Conduct frequent, consistent volunteer meetings to promote a greater understanding of expectations, encourage accountability and build trust.
- **Regular Training:** Participate in and host consistent group trainings across a number of topics that staff and volunteers identify. Not only does regular training improve response and increase digital volunteer engagement, it conveys to skeptical decision makers that those providing SMEM surge support are knowledgeable experts.
- **Active Membership:** Provide multiple means to participate in volunteer meetings (i.e., in-person, video conference and teleconference). Disseminate recordings or supporting documentation to those unable to attend in order to advance information sharing.
- **Collaboration:** Digital volunteers use real-time, open-source tools before, during and after incidents. Many volunteers also maintain constant contact through instant messaging systems. This dedication to transparent collaboration results in increased information sharing, more effective information management and higher levels of trust, and reduces the duplicity of efforts.
- **Community Building:** An organization’s communications with digital volunteers and among volunteers themselves should not be limited to formal meetings and activations. Provide an informal collaboration space on social media or via a communication platform (e.g., Slack) to build trust, buy-in and community ahead of an incident.

1.3 State Laws, Policies, and Liability

It is important to consider strategies and policies to mitigate liability and associated risks of a digital volunteer program, as volunteers may be considered to be acting on an organization’s

⁵ DHS S&T SMWG. “From Concept to Reality: Operationalizing Social Media for Preparedness, Response, and Recovery.” April 2016, <https://bit.ly/2m4kHgo>. Accessed 5 June 2018.

⁶ “Volunteer Service Agreement.” *Colorado Division of Homeland Security & Emergency Management Department of Public Safety*, <https://bit.ly/2ucTo6s>. Accessed 12 June 2018.

behalf.⁷ Laws, such as the Federal Volunteer Protection Act of 1997, often have unique requirements that differ across states and jurisdictions.⁸ For example, every state has a Good Samaritan statute; however, coverage eligibility varies by state.⁹ **Therefore, users should engage their agency's attorney as part of digital volunteer program planning.** To mitigate risks, some agencies point to a social media policy, which may include specific areas such as privacy, freedom of speech, freedom of information, public records management, public disclosure, and accessibility. For common SMEM legal considerations, in addition to step-by-step guidance on developing a Contingency Plan to mitigate risks, see the S&T Social Media Business Case Guide (Section 1.7).

⁷ Robson, Edward S. *Responding to Liability: Evaluating and Reducing Tort Liability for Digital Volunteers*. Washington, DC: Woodrow Wilson International Center for Scholars, 2012.

⁸ Volunteer Protection Act of 1997, Pub. L. 105-19. 111 Stat. 218. 18 June 1997, <https://bit.ly/1YLjAxa>. Accessed 12 June 2018.

⁹ "Volunteer Protection Acts and Good Samaritan Laws." *ASTHO*, <http://www.astho.org/Programs/Preparedness/Public-Health-Emergency-Law/Emergency-Volunteer-Toolkit/Volunteer-Protection-Acts-and-Good-Samaritan-Laws-Fact-Sheet/>. Accessed 9 Jul. 2018.

2.0 How to Recruit Digital Volunteers

This step outlines the suggested process for identifying and screening digital volunteers as part of an organization's digital volunteer program. Each section outlines a brief introduction to the step, provides supporting guidance materials, and includes examples from real-life practitioners where applicable. User considerations directly inform completion of the Digital Volunteer MOU Template and SOP Template. **Users are encouraged to download, complete and/or modify these templates in a way that suits their organization's needs.**

2.1 Application Review

First, digital volunteer applicants should either be selected from existing informal relationships (e.g., practitioner network), a formal relationship (e.g., partnership with a digital volunteer organization) or through a formal application system, such as the Colorado VOST [online application](#).¹⁰ Applicant information should be reviewed prior to interviews with a focus on the skills and traits that will best complement an organization's existing team and activation needs. The following table highlights the key volunteer skills and traits that practitioners identified as the most prevalent across successful digital volunteers.

Skill Sets	Success Traits
<ul style="list-style-type: none">• Understanding of the social media platforms and tools used by your organization• Familiarity or experience with emergency operations and messaging• Strong analytical and critical thinking• Amplification and curation of messages• Social listening and rumor management• Geographic Information System (GIS)/Imagery analysis	<ul style="list-style-type: none">• Flexible• Creative• Reliable and committed• Team player• Self-direction• Quick learner• Time management• Works well under stress

2.2 Background Check

It is a best practice to conduct a background check before allowing an individual to join a digital volunteer team. Organizations should review applicable federal, state and local laws, as background checks are frequently mandated. Some organizations choose to conduct internal background checks, while others outsource the responsibility to a partner organization or Volunteer Team Leader. While background check methods vary by state, the following general instructions can guide procedures:

¹⁰ Join COVOST. State of Colorado Division of Homeland Security and Emergency Management, 2018, <https://www.colorado.gov/pacific/dhsem/join-covost>. Accessed 13 June 2018.

1. Speak to your organization's attorney on how local laws govern the use of background checks.
2. Decide who will conduct the background check (e.g., your agency, partner organization, Volunteer Team Leader).
3. Identify a Fair Credit Reporting Act compliant agency or accredited Consumer Reporting Agency to conduct the background check.
4. Include the following in the background check:
 - a. Criminal records check;
 - b. Social security validation;
 - c. Address history check;
 - d. U.S. terror watch check; and
 - e. Sex offender registry check.
5. Inform the volunteer applicant of the background check. Some practitioners also ask the applicant to authorize the background check in writing.
6. Conduct the background check.
7. Apply the same background check process to every candidate.

2.3 Interview

If an applicant passes the initial screen and background check, the individual should be interviewed by staff with a strong understanding of digital volunteer objectives and desired outcomes. An individual's social media presence (both personal and professional) should be taken into consideration at this stage. The interview serves two purposes:

- Supports the development of a well-rounded team of reliable experts that can best suit unique agency needs; and
- Allows the applicant to better understand the agency.

The table below highlights common interview formats.

Interview Type	Benefit	Limitation
In-person	<ul style="list-style-type: none"> - There is no substitute for connecting with a potential volunteer face-to-face - Can easily read body language - Shows a certain level of commitment - Materials and technologies, like social media, can be used to support the interview 	<ul style="list-style-type: none"> - Interviews take up more time - Scheduling is a challenge - Challenging for candidates to attend that live outside of the area
Online Questionnaire	<ul style="list-style-type: none"> - Maximize time for staff and applicants - Can ask as many questions as you like - Can easily review a large pool of applicants - Can easily filter out those that do not meet your minimum requirements 	<ul style="list-style-type: none"> - Dishonesty can be an issue - No way to determine soft skills - Room for misinterpretation - Lack of personalization - Issues with accessibility
Video (e.g., Google Hangout, Skype)	<ul style="list-style-type: none"> - Can tell if the applicant is focused - Can reach long-distance candidates - It is quicker than an in-person interview 	<ul style="list-style-type: none"> - It is challenging to read body language - It is difficult to build rapport - Technology can present barriers or fail

Potential Interview Questions

1. Why are you interested in volunteering with our agency?
2. Have you volunteered in the past? If so, for what organizations and in what roles?
3. What is your availability? (e.g., days and hours)
4. What unique or specialized skills do you possess that you would like to apply as a volunteer?
5. Is there a particular activity that you are interested in supporting? (Checklist of options below)

Digital Volunteer Activities	Interest (Y/N)
Social Media Listening	
Rumor Management	
Crisis Mapping	
Incident Analytics and Tracking	
Research and Content Development for Emergency Messaging	
Social Media Situation Status Reports	
Crowdsourced Information Gathering	
GIS/Imagery Tracking	

6. Are there tasks that you feel unequipped to do as a volunteer?
7. Please describe your experience in emergency management operations.
8. What relevant trainings (e.g., emergency management, social media management) have you participated in over the last few years?
9. Are you interested in additional training?
10. Please describe your ideal supervisor.
11. Would you rather work by yourself, with a partner or with a group? Why?
12. What are two personal habits that have served you well?
13. What questions can I answer for you?

2.4 Exercise

Once a candidate is identified, many practitioners choose to do a trial run in the form of an exercise or test case. Exercises help to assess how the candidate responds in a non-emergency situation. For more information on SMEM exercises, see the S&T SMWG Report “[Best Practices for Incorporating Social Media into Exercises](#).”¹¹

Volunteer Exercise Examples

Practitioners pointed to the following exercises as valuable for screening potential volunteers:

- Ask the potential volunteer to attend a movie and live tweet the show to assess listening capabilities and the ability to determine crucial information.

¹¹ DHS FRG SMWG, “Best Practices for Incorporating Social Media into Exercises.” March 2017, <https://bit.ly/2HYbXRS>. Accessed 5 June 2018.

- Ask the potential volunteer to search a hashtag and pull out pertinent information among “the noise.”

2.5 Trainings

As a final step in the application process, some practitioners require or recommend that volunteers complete internal and/or external trainings prior to the first activation. The following practitioner recommended trainings are in alphabetical order.

Internal Trainings

- Digital Volunteer SOP and expectations (e.g., handling sensitive information)
- Introduction to the organization’s mission, objectives and values
- Introduction to the organization’s social media platforms and plan
- Liability
- Observe and “shadow” a volunteer activation
- Participate in applicable organization exercises
- Social media monitoring skills
- [VOST Activation Workbook User Guide](#)

External Trainings

- [G 290 Basic Public Information Officer](#)¹²
- [G 291 Joint Information Center/Systems](#)¹³
- [IS 100 Introduction to Incident Command Systems](#)¹⁴
- [IS 200 ICS for Single Resources and Initial Action Incidents](#)¹⁵
- [IS 700 National Incident Management System \(NIMS\)](#)¹⁶
- [IS 702 NIMS Public Information Systems](#)¹⁷
- [IS 800 National Response Framework , An Introduction](#)¹⁸
- [IS 29 Public Information Officer Awareness](#)¹⁹
- [IS 42 Social Media in Emergency Management](#)²⁰
- [PER-304 Social Media for Natural Disaster Response and Recovery](#)²¹
- [Social Media Analysis During Disasters](#)²²

¹² “G290.” *FEMA Emergency Management Institute (EMI)*, 23 May 2016, bit.ly/2NsWU5s. Accessed 12 June 2018.

¹³ “G291.” *FEMA EMI*, 23 May 2016, <https://bit.ly/2ziHlow>. Accessed 12 June 2018.

¹⁴ “IS-100.B.” *FEMA EMI*, 23 May 2016, <https://bit.ly/1VttFib>. Accessed 12 June 2018.

¹⁵ “IS-200.B.” *FEMA EMI*, 8 June 2018, <https://bit.ly/1nEuylc>. Accessed 12 June 2018.

¹⁶ “IS-700.A.” *FEMA EMI*, 8 June 2018, <https://bit.ly/2K6DAfv>. Accessed 12 June 2018.

¹⁷ “IS-702.A.” *FEMA EMI*, 8 June 2018, <https://bit.ly/2NuBbKo>. Accessed 12 June 2018.

¹⁸ “IS-800.C.” *FEMA EMI*, 8 June 2018, <https://bit.ly/2fBd1x0>. Accessed 12 June 2018.

¹⁹ “IS-29.” *FEMA EMI*, 8 June 2018, <https://bit.ly/2Nt8IVs>. Accessed 12 June 2018.

²⁰ “IS-42.” *FEMA EMI*, 8 June 2018, <https://bit.ly/2m3EuMt>. Accessed 12 June 2018.

²¹ “Social Media for Natural Disaster Response and Recovery (PER-304).” *National Disaster Preparedness Training Center at the University of Hawai’i (NDPTC)*, <https://bit.ly/2zeOHyN>. Accessed 12 June 2018.

²² “Social Media Analysis During Disasters.” *NIH Disaster Information Management Research Center*, 4 April 2018, https://sis.nlm.nih.gov/dis_courses/social-media/index.html. Accessed 12 June 2018.

- [Social Media Engagement Strategies](#)²³
- [VEMA Offerings](#)²⁴

²³ "Social Media Engagement Strategies (PER-343)." *NDPTC*, <https://bit.ly/2KUsF5S>. Accessed 12 June 2018.

²⁴ "Upcoming Events." *Virtual EMA*, <http://www.virtualema.org/events>. Accessed 12 June 2018.

3.0 Digital Volunteer Standard Operating Procedure Template Guidance

This step provides critical thinking exercises and guidance to help users complete the Digital Volunteer SOP Template. **Users are encouraged to download, complete, and/or modify the SOP Template in a way that suits their organization's needs.** Clear SOPs improve coordination across volunteers and staff, create efficiencies, minimize errors, and regulate routine tasks. Standard procedures allow public safety officials to focus on the most critical activities throughout each phase of deployment (Pre-deployment, Activation, Deployment, Deactivation, and Post-Deployment).

3.1 Purpose

The Purpose section of the Digital Volunteer SOP Template should provide a brief description of the SOP purpose and describe why the SOP is required. Throughout SOP development, refer to this purpose statement to ensure alignment. When filling out the Purpose section of the SOP Template, consider the following:

1. What is the objective of the SOP? (e.g., create a consistent approach to leveraging digital volunteers, improve EOC effectiveness when responding to a major incident)
2. Who will be using the SOP? (e.g., EOC command staff, digital volunteers)

3.2 Scope

The Scope section of the Digital Volunteer SOP Template should list participating agencies and jurisdictions. Throughout SOP development, refer to this scope to ensure alignment. When filling out the Scope section of the SOP Template, consider the following:

1. What participating agencies and jurisdictions should be included in this SOP?
2. What are the roles and responsibilities of participating agencies and jurisdictions?
3. Are there existing agreements (e.g., MOUs) in place among agencies?
4. What is the chain of command among participating agencies and jurisdictions? (e.g., Volunteer Team Leader reports directly to the EOC Operations Branch Chief)
5. What are the terms to enact the SOP? (e.g., natural or man-made disaster, planned events)

3.3 Pre-deployment

The Pre-deployment section of the Digital Volunteer SOP Template should describe the process for establishing relationships with digital volunteers and identifying volunteer capabilities. It is imperative that Incident Decision Makers and the Agency Volunteer Manager understand how to utilize digital volunteer abilities prior to activation in order to improve operational flow and the effective delegation of tasks. When filling out the Pre-Deployment section of the SOP Template, consider the following:

1. Are other organizations in your region integrating digital volunteers into operations?
2. If yes, what are their lessons learned?

3. How often will your organization meet with digital volunteers and through what means? (e.g., web-based coordination platforms, regular in-person training with staff, web conference)
4. What trainings must occur to maintain social media and online tool proficiency?

Example Procedures

Meeting Cadence: Regular meetings with volunteers promote a greater understanding of expectations, encourage accountability, and build trust.

Training and Exercises: Training and exercises help to maintain social media and online tool proficiency, in addition to educating volunteers on how the EOC, ICS, Joint Information System, and Joint Information Command function during a real incident. These trainings may include informational tours and briefings on procedures, as well as opportunities to participate in facility and system tests. For more information on common SMEM trainings, see “How to Recruit Digital Volunteers” (Section 2.5).

The following table highlights common pre-deployment tools:

Common Tools	Purpose	Value
Slack	Collaboration tool that provides chat and information sharing features, such as file integration.	Supports a culture of transparency, collaboration, and fun. The platform brings together volunteers and organizes communications in an intuitive and searchable format.
Skype	Communication tool that provides video, voice, chat and screen share features.	Enables volunteers to communicate with volunteers via voice, video, and instant messaging over the internet. The platform’s video capabilities are a strong supplement to in-person meetings.
WhatsApp	Messaging tool that provides chat features.	Enables Team Leads to target messages, photos, and videos to select groups of volunteers with end-to-end encryption, ensuring privacy.
Closed Facebook Groups	Social media tool that provides a space to forge connections and share content.	Allows volunteers to collaborate and get to know one another on a widely used platform. If volunteers use Facebook groups regularly, groups also serve as a training opportunity.

Common Roles

- Incident Decision Makers
- Agency Volunteer Manager
- Agency Training Coordinator
- Volunteer Team Leader
- Team Members

3.4 Activation

The Activation section of the Digital Volunteer SOP Template should describe the process for alerting digital volunteers of an incident and activating available volunteers to conduct the mission and objectives. Typically, agencies provide guidance on how and when volunteers should self-activate; require direct order instructions from the Agency Volunteer Manager; or a combination of the two approaches. When filling out the Activation section of the SOP Template, consider the following:

1. What are the activation thresholds for volunteers? (e.g., scale of incident, special skills or credentials needed)
2. Who else from your organization should be involved in determining the activation thresholds for volunteers?
3. What is the activation approval process?
4. Who is part of the activation approval chain?
5. Who will be responsible for communicating activation status to the volunteers? (e.g., Incident Decision Makers, Agency Volunteer Manager)

Example Procedures

Direct Order: When using a Direct Order approach, the SOP should outline how the agency's point of contact (POC) will order the activation and provide detailed instructions to volunteers. Volunteer orders commonly include: expected duration of deployment; number of volunteers needed; duties; and specific skills, credentials, and types of volunteers needed.

Self-Activation: The self-activation approach is more common among agencies that leverage informal relationships. Self-activation allows for the volunteer team to stand up quickly and immediately begin social media information collection and relies heavily on robust training and/or exercises during pre-deployment. Typically, a pre-identified number of volunteers self-activates for specific events outlined in the SOP.

The following table highlights common activation tools:

Common Tools	Purpose	Value
Activation Roster	A roster of volunteers in an easy to access file that outlines volunteer availability (e.g., days and times).	The designated POC can quickly reach out to volunteers to request support and confirm availability.
Email	Communication tool for transmitting messages.	POCs can reach out to volunteers to request support.
Slack	Collaboration tool that provides chat and information sharing features, such a file integration.	POCs can quickly reach out to volunteers to request support, confirm availability and form a team, all in one platform.

Common Tools	Purpose	Value
Skype	Communication tool that provides video, voice, chat and screen share features.	POCs can reach out to volunteers to request support, confirm availability and form a team, all in one platform.
Short Message Service (SMS) or Phone (Voice)	Communication tool for transmitting messages.	POCs can reach out to volunteers to request support.
WhatsApp	Messaging tool that provides chat features.	POCs can reach out to volunteers to request support with end-to-end encryption.

Common Roles

- Agency Volunteer Manager (or designated POC)
- Volunteer Team Leader
- Available Digital Volunteers

3.5 Deployment

The Deployment section of the Digital Volunteer SOP Template should describe digital volunteer deployment procedures and activities for all common incidents in detail. The SOP Template should also enforce clear accountability and expectations, including internal workflows and how to report back to the Agency Volunteer Manager. When filling out the Deployment section of the SOP Template, consider the following:

1. Which incident decision maker or agency representative will act as the Agency Volunteer Manager?
2. Who will report to the incident command on digital volunteer activities? (e.g., Agency Volunteer Manager, Volunteer Team Lead)
3. What digital volunteer activities will best meet your outlined objectives? (e.g., crisis mapping, social media monitoring)
4. What is the required frequency of volunteer reporting to effectively accomplish activities?
5. What information should be included in volunteer reporting?

Example Procedures

Activities: Volunteers typically conduct a combination of the following activities:

- Social media monitoring, analysis and reporting (calls for help, situational awareness)
- Crisis mapping
- Creation of periodic and narrative listening reports
- Message amplification (retweets, engagement)
- Content creation (pre-approved messaging, alerts, storytelling)

- Public information supplementation (press releases, urgent messages, countering false information)²⁵
- Response and recovery coordination
- GIS/Imagery analysis

Just in Time Training (JITT): Many practitioners provide JITT materials for volunteers that require a refresher on policies, procedures and deployment activities. JITT typically includes guidance to manage common incidents and handouts for the numerous roles/activities described in this section. For a list of relevant digital volunteer and SMEM trainings, see “How to Recruit Digital Volunteers” (Section 2.5).

Reporting/Briefings: Volunteer reporting expectations (who will report, how often, and what is to be included) should be determined in accordance with agency needs. Volunteers typically provide a report at the end of every shift, and Volunteer Team Leaders distribute high-level reports to the Agency Volunteer Manager every 12 hours.

Shifts: Volunteer shifts should be determined in accordance with agency needs and volunteer availability. Typically, volunteers are active for 4 hours and it is best practice for volunteers to arrive 15 minutes early to debrief prior to activation.

The following table highlights common deployment tools.

Common Tools	Purpose	Value
Activation Workbooks (such as the VOST Workbook) ²⁶ Typically, a password protected Google Document, Wiki, Social Media Group or Blog	Includes all incident information in one open source file or location that is easily accessible.	Allows teams to easily track and maintain a record of volunteer hours, activities, resources and lessons learned.
Google Hangout/Chat, Private Facebook Group, Skype, Slack, WhatsApp	Communication tools that provide chat and information sharing features.	Enables quick and constant communication among volunteer teams. These tools (or combination of tools) act as a virtual incident base for volunteers.
Buffer; Hootsuite; HubSpo; If This, Then That (IFTTT); Sprout Social; Trello; Tweetdeck; ZoomSphere	Social media management tools that help users publish content and monitor engagement across multiple platforms simultaneously.	Enables digital volunteers to share content more quickly, monitor platforms and control messaging through an incident.

²⁵ DHS S&T SMWG. “Countering False Information on Social Media in Disasters and Emergencies.” March 2018, <https://bit.ly/2uFGS2R>. Accessed 5 June 2018.

²⁶ Reddy-Hjelmfelt, M. “PNW VOST Workbook Template.” *The Red Elm*, 14 August 2013, https://docs.google.com/spreadsheets/u/1/d/1ncwf_J_CEPkcchZ7_L4WNzqMfPVxaUFL8zRvVTDe02A/edit#gid=9. Accessed 12 June 2018.

Common Tools	Purpose	Value
Buffer, Facebook Analytics, Google Analytics, Hootsuite, Mention, Sprout Social, Tweetdeck	Social media analytics tools that support data collection and the creation of compelling metrics.	Allows digital volunteers to create easy to read reports on metrics to inform incident command situational awareness.

Common Roles

- Agency Volunteer Manager
- Volunteer Team Leader
- Selected Team Members

3.6 Deactivation

The Deactivation section of the Digital Volunteer SOP Template should describe how to conclude operations and volunteer efforts. When filling out the Deactivation section of the SOP Template, consider the following:

1. Who within your organization determines that volunteer operations will end?
2. Which decision maker(s) have the authority to order deactivation?
3. Who communicates deactivation to the volunteer team?

Example Procedures

Archive: Maintain an official archive of the activation within your organization. This protects against liability risks and can even be used for future trainings or sharing lessons learned.

Data Sharing: Ensure that volunteers will transmit all the requested products and services created, to your agency.

The following table highlights common deactivation tools.

Common Tools	Purpose	Value
Activation Workbooks	Stores all incident information in one open source file that is easily accessible.	Allows teams and organizations to access activation data at a later date for further SMEM analysis or administrative reports.

Common Roles

- Incident Decision Makers
- Agency Volunteer Manager
- Volunteer Team Leader

3.7 Post-deployment

The post-deployment phase occurs after the incident ends and deactivation is completed. The post-deployment section of the Digital Volunteer SOP Template should provide instructions on conducting a final review of what worked well and making recommendations for improvement. The SOP Template should also outline next steps for managing the data collected during the incident. When filling out the post-deployment section of the SOP Template, consider the following:

1. How will your agency maintain an official incident archive in your system?
2. Who should be involved in the After Action Review (AAR)?
3. How soon after deactivation should the AAR be completed?

Example Procedures

Lessons Learned: Conduct an AAR to identify, document, and learn from successes and failures.

SOP Updates: To ensure a SOP maintains effectiveness over time, it should be reviewed following activation and revised. If a procedure is no longer necessary, delete it from the SOP or make changes to reflect lessons learned.

The following table highlights common post-deployment tools.

Common Tools	Purpose	Value
Activation Workbook	Stores all incident information in one open source file that is easily accessible.	Allows teams and organizations to archive activation data and other items to potentially follow up on prior to the next incident.
Buffer, Facebook Analytics, Google Analytics, Hootsuite, Mention, Sprout Social, Tweetdeck	Social media analytics tools that support data collection and the creation of compelling metrics.	Provides analytics to support the identification of areas of improvement and lessons learned.
ArchiveSocial, Page Freezer, Smarsh	Social media archiving tools that provide continuous archiving and data management across agency social media accounts.	Equips an agency to handle legal requests in case there are ever questions about what the organization has done and why.
Hot Wash	Meeting to reflect on the work of a group, and identify strengths, weaknesses and areas for improvement.	This open and honest discussion allows both staff and volunteers to assess performance as a team.
After Action Report	Document that captures strengths, weaknesses and areas for improvement.	Formal documentation helps future teams learn from successful strategies and avoid pitfalls the team worked to overcome.

Common Roles

- Incident Decision Makers
- Agency Volunteer Manager
- Agency Training Coordinator
- Volunteer Team Leader
- Team Members

4.0 Digital Volunteer Memorandum of Understanding Template Guidance

This step provides critical thinking exercises and guidance to help users complete the Digital Volunteer MOU Template. **Users are encouraged to download, complete and/or modify the MOU Template in a way that suits their organization's needs.** With multiple partners working together across disciplines, a MOU outlines digital volunteer terms in writing, clearly defining roles and responsibilities prior to an incident, thereby decreasing misunderstandings and future conflicts. For an example of an agreement template between an organization and an individual, refer to the [Colorado VOST Volunteer Service Agreement](#).²⁷

4.1 Purpose

The Purpose section of the Digital Volunteer MOU Template should describe the intent of the MOU and establish measurable objectives to help track progress and impact among organizations. For more assistance in defining objectives, refer to the S&T Social Media Business Case Guide (Section 1.1). When filling out the Purpose section of the MOU Template, consider the following:

1. What is the aim of this partnership?
2. Why is this partnership important to each partner?
3. In what circumstances can digital volunteers be used? (e.g., wildfire, flooding, planned sporting events)
4. Are there associated procedures that should be referenced in the MOU? (e.g., existing digital volunteer SOPs from each organization or a joint SOP)

Example Objective

When a disaster occurs and it is determined that response needs exceed the expectations of [Organization One], [Organization One] and [Organization Two] will work cooperatively with each other and encourage local counterparts to do the same.

4.2 Definitions

The Definitions section of the Digital Volunteer MOU Template should include definitions for terms that are subject to varying interpretation. When filling out the Definitions section of the MOU Template, consider the following:

²⁷ "Volunteer Service Agreement." *Colorado Division of Homeland Security & Emergency Management Department of Public Safety*, <https://drive.google.com/file/d/0B2pPEZapFDm-clkySUpqYzdBMmM/view>. Accessed 12 June 2018.

1. What are the technical and/or operational characteristics of the partnership? Consider including definitions for each. (e.g., incident, emergency support functions)
2. Are there any community-specific terms or acronyms? Consider including definitions for each.

Example Definitions

Disaster: For the purpose of this MOU, a disaster is a natural or human-made event of such destructive magnitude as to suddenly dislocate the public; damage or destroy homes; and/or cause injury, illness, and death.

Hotwash: For the purpose of this MOU, a hotwash is a meeting held post-exercise or incident to collect initial volunteer and EOC staff feedback. As part of the meeting, participants discuss what went well and what improvements are needed to improve future response.

4.3 Scope

The Scope section of the Digital Volunteer MOU Template should list the organizations to be included in the agreement and describe their relationship, including POC information. In more detailed MOUs, some practitioners recommend including the roles and responsibilities for each phase of deployment (Pre-deployment, Activation, Deployment, Deactivation, and Post-Deployment). For common roles and responsibilities, refer to “How to Develop a Digital Volunteer Program Strategy” (Section 1.2).

Example Roles and Responsibilities

1. Upon the request of **[Organization One]**, **[Organization Two]** will activate if it has the capacity and availability.
2. Both **[Organization One]** and **[Organization Two]** will jointly participate in at least two SMEM trainings, exercises and other developmental opportunities per year to improve response coordination and cooperation.

4.4 Relevant Laws

The Relevant Laws section of the Digital Volunteer MOU Template should reference any applicable federal, state and local laws relevant to the MOU, especially when partnering with an external organization. For more information on common legal considerations to take into account, refer to the S&T Social Media Business Case Guide (Section 1.2). When filling out the Relevant Laws section of the MOU Template, consider the following:

1. Which local laws may affect your partnership and/or use of digital volunteers?
2. Which state laws may affect your partnership and/or use of digital volunteers?
3. Which federal laws may affect your partnership and/or use of digital volunteers?
4. When should you engage your agency’s legal counsel as part of planning?

4.5 Updates to the MOU

The Updates to the MOU section of the Digital Volunteer MOU Template should describe the process and frequency of MOU updates. It is a best practice to review and update a MOU at

least annually, although some practitioners review the MOU after each activation. When filling out the Updates section in the MOU Template, consider the following:

1. Who has the authority to update the MOU?
2. What type of updates will require input (or signatures) of all parties?
3. How will lessons learned be incorporated into the MOU after a joint activation?
4. How will POCs be notified about updates? (e.g., informal call, email, formal memo)

4.6 Agreement

In the Agreement section of the Digital Volunteer MOU Template, authorized representatives of each party execute the MOU and certify that they have read, understood and agree to the terms and conditions.

Digital Volunteer Standard Operating Procedure Template

[Organization]

[Issue Date]

[Revision Date]

Purpose Statement

The purpose of this Standard Operating Procedure (SOP) is to specify the standardized requirements for digital volunteers to effectively support [Organization] activities by [describe activities].

Provide a brief description of why the SOP is required.

Scope

The scope of this SOP includes [list all organizations and jurisdictions participating in the SOP]. The SOP will be used by activated digital volunteers during critical incidents or at the discretion of [Incident Decision Makers].

Pre-deployment

Describe the necessary procedures (e.g., meeting cadence, training and exercises) for establishing relationships with digital volunteers and identifying volunteer capabilities. Highlight common tools in the table below.

Tool	Purpose	Value
Highlight common pre-deployment tools (e.g., Slack)	Describe the tool's purpose (e.g., collaboration tool)	Describe the tool's value (e.g., brings together volunteers and organizes communications in an intuitive and searchable format)

Roles and Responsibilities:

Describe the associated roles and responsibilities for establishing relationships with digital volunteers and identifying volunteer capabilities.

Activation

Describe the process (e.g., Direct Order, Self-Activation) for alerting digital volunteers of an incident and activating available volunteers to conduct the mission and objectives. Highlight common tools in the table below.

Tools	Purpose	Value
Highlight common activation tools	Describe the tool's purpose	Describe the tool's value

Roles and Responsibilities:

Describe the associated roles and responsibilities for alerting digital volunteers of an incident and activating available volunteers to conduct the mission and objectives.

Deployment

Describe digital volunteer deployment procedures (e.g., reporting, briefings, shifts) and activities (e.g., social media monitoring, message amplification) for all common incidents in detail. Highlight common tools in the table below.

Tools	Purpose	Value
Highlight common deployment tools	Describe the tool's purpose	Describe the tool's value

Roles and Responsibilities:

Describe the associated roles and responsibilities for deployment activities.

Deactivation

Describe the procedure for concluding operations (e.g., archive) and volunteer efforts (e.g., data sharing). Highlight common tools in the table below.

Tools	Purpose	Value
Highlight common deactivation tools	Describe the tool's purpose	Describe the tool's value

Roles and Responsibilities:

Describe the associated roles and responsibilities for concluding operations and volunteer efforts.

Post-deployment

Describe the procedure for managing volunteer incident data (e.g., archive) and conducting an After-Action Review to identify, document, and learn from successes and failures. Highlight common tools in the table below.

Tools	Purpose	Value
Highlight common deactivation tools	Describe the tool's purpose	Describe the tool's value

Roles and Responsibilities:

Describe the associated roles and responsibilities for managing incident data and conducting an After-Action Review.

Digital Volunteer Memorandum of Understanding Template

[Organization One] and [Organization Two]

Purpose

The purpose of this Memorandum of Understanding (MOU) is to define the working relationship between [Organization One] and [Organization Two] when using digital volunteers to prepare for, respond to and recover from disasters. Both parties intend to focus digital volunteer activities around the following objectives:

Objective One	Define partnership objectives.
Objective Two	
Objective Three	

These objectives will be achieved in accordance with procedures as outlined in the [list all relevant organizational Standard Operating Procedures].

Definitions

Include definitions for terms that are subject to varying interpretation.

Scope

This Digital Volunteer MOU includes [Organization One] and [Organization Two]. MOU participants agree to engage and collaborate on the following activities:

[Organization One] will:

1. Describe the parties' roles and responsibilities for the MOU.
- 2.
- 3.

[Organization Two] will:

1. Describe the parties' roles and responsibilities for the MOU.
- 2.
- 3.

[Organization One] and [Organization Two] will:

1. Describe shared roles and responsibilities between parties for the MOU.
- 2.
- 3.

The table below outlines key points of contact from each organization.

	[Organization One]	[Organization Two]
Representative Name		
Representative Title		
Mailing Address		
Phone Number		
Fax Number		
Email Address		

Relevant Laws

Reference any applicable Federal, state, and local laws relevant to the MOU.

Updates to the MOU

Representatives of [Organization One] and [Organization Two] will meet [Time Frame] (e.g., annually) to evaluate the MOU and revise and/or create new plans, as appropriate. This MOU may be modified upon the mutual, written consent of the parties.

Agreement

This MOU expresses the mutual understandings of [Organization One] and [Organization Two] and is not a legally binding document. This MOU shall be effective on [Effective Date] and remain in effect until [Termination Date]. The term may be extended by written agreement of the parties or terminated, in writing, by either member at any time.

[Organization One]

[Organization Two]

Representative Name and Title

Representative Name and Title

Date

Date