

Playbook - Offers

Created by KW, Last updated: Dec 2023

USE THIS PLAY TO...

- ☐ Record Offers of donations and spontaneous volunteers by Emergency Relief staff
- ☐ Enable the public Offers Form so that people can enter offers themselves
- ☐ Review Offers and allocate to Recovery Cases

THIS PLAY USES THE FOLLOWING REGISTERS...



THE FOLLOWING POSITIONS CAN ACCESS...



Introduction

During an emergency, you will likely receive many offers of volunteer assistance and donations from the community. Your council should have guidelines for managing donations and offers of assistance. This guide aims to provide some valuable tips on managing Offers and volunteers using Crisisworks. This Playbook applies to:

- Offers of material aid
- Donations
- Spontaneous volunteers

- Offers of accommodation

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Managing Offers

An offer is a record of a person or organisation offering material or in-kind assistance.

Offers feature under **Operations** in Crisisworks.

- Decide which offers will be accepted and recorded, and which offers should be diverted or refused.
- Decide on a process to manage spontaneous volunteers, these can also be recorded in the Offers system
- Decide on a workflow to manage receipt, review and allocation of offers. See the sample workflow below.
- Offers are entered into Crisisworks, assigned to position coordinating the category, and status set to Available.

- Use the Assigned field to allocate the Offer to a position to manage, for example the Deputy MRM for all the accommodation needs and offers. Assigning to positions rather than actual people aids in tracking progress between shift changeovers.
- Use the Workflow Status to indicate if the offer is available, in use, unavailable or closed. Other workflow fields allow for prioritising, assigning, setting of a review date tagging to aid in management.
- Categories and subcategories of the Form can be customised in the System Look-ups.

[More on Modifying Lists using Look-ups](#)

Public Offers Form

Offers can also be entered directly by your community using the Crisisworks Public Offers form. Offers can then be reviewed by your Team and either accepted (or rejected) and then matched to a need identified in a recovery case.

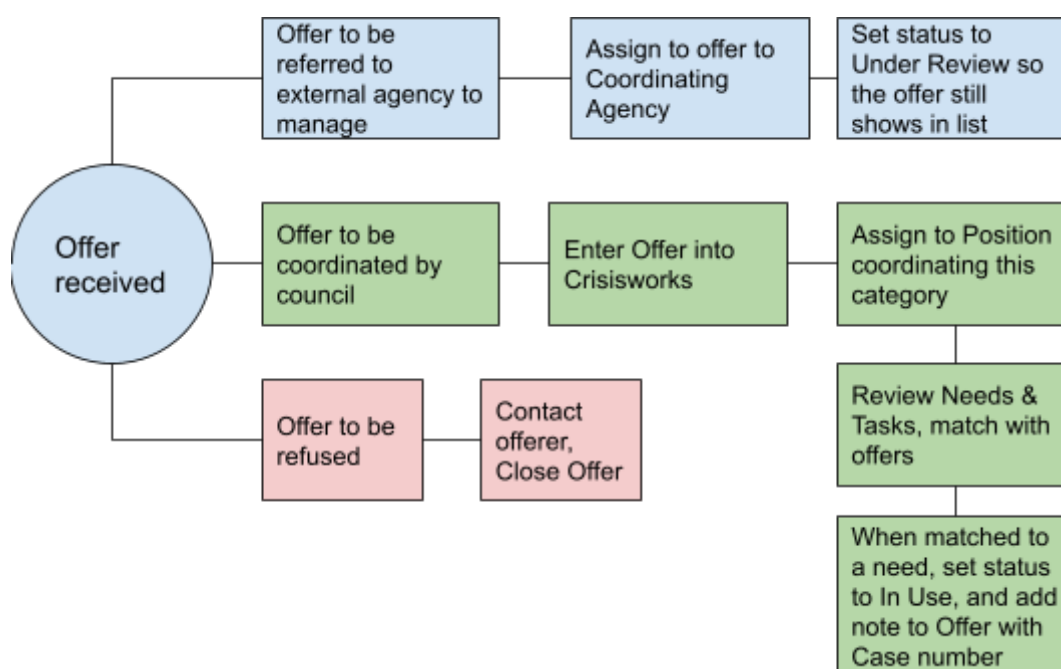
To activate the Public Offers Form:

- you must add the Public Offer User to the Event and make sure your Event has Offers and Contacts active
- you then need to put the Public Offer User - On Duty for the Event
- The public offer form will be available via <https://yourcouncil.crisisworks.com/register/public-item/new/register/offer>
- The Public view of the Offer form doesn't show any of the Workflow on the right hand side, instead, you are able to customise this text by editing the Public Offer Help Text in your Crisisworks Library.
- Include a link on your website to the public form, and generate a QR Code to include in flyers and other community messaging to direct people straight to the offers page.

[More on Public Offers and Spontaneous Volunteers](#)

[More on generating a QR Code for public forms](#)

GIVITIT: Emergency Recovery Victoria is working closely with GIVIT to help disaster-impacted communities get the help they need through donations. This service should be factored into Council's planning for offers and donations. www.givit.org.au



Players

Make a note below of the people involved in Offers.

Role	Description	People
Municipal Recovery Manager (MRM)	The Municipal Recovery Manager provides overall management of relief and recovery, and will be a point of leadership in the event.	

Role	Description	People
Relief and Recovery Coordinators and Officers		
Emergency Operations Centre (EOC)	The EOC is where Council's emergency operations are coordinated from.	
Emergency Operations Team (EOT)	The EOT are staff working out of Council's EOC	
ERC Support Officers	The ERC may receive offers of support or donations of goods at the ERC. Your ERC operating procedures will provide advice on how to manage these.	

Workflow

Write below the specific services offered as part of the event before distributing this playbook.

Offer	Workflow Method	WHO... is Coordinating this category of Offer
Accommodation – short and longer term	Enter Offer details in Crisisworks. Assign Offer to responsible offer	Deputy MRM
Agriculture Supplies	Any offers of Ag supplies to be referred to AgVic <	
Volunteers - spontaneous	Enter offer details in Crisisworks; or Direct the Volunteer to register at...	
Accommodation - offsite	Enter Offer details in Crisisworks. Assign Offer to responsible offer	
Donations	<i>Decision: What donations will you receive and which will you refuse?</i>	

Offer	Workflow Method	WHO... is Coordinating this category of Offer
	Enter Offer details in Crisisworks. Assign Offer to responsible offer	

Set up

Offers will appear under the Operations tab when it is enabled in your current event.

Assignment and management of offers are handled by users with the [Offer](#)

[Coordinator policy](#)

Brief the team

Keep your Team informed by maintaining a **Library** record with the latest business rules and workflows. Label it clearly as '*OFFERS & DONATIONS - rules for xyz Event*' or '*Process - managing OFFERS and VOLUNTEERS for xyz Event*', and include a link to the Information ID number in the 'Incident Action Plan". This Information entry can be updated as the emergency unfolds and coordination processes are put in place.

Add tags to the item to make it easy to find, (eg offers, processes), assign it to the person or role coordinating Offers and set a review date/time to the record.

Recording an Offer

Create an Offer record, being sure to:

- Use the categories and sub categories to organise the offers
- Assign the offer to the role that's looking after this item

- Use the Priority feature to highlight items that are urgent etc
- Use the Review Date to remind the Assignee to follow up on any actions.
- Use the counters on the main Offers menu to quickly navigate to the items you're looking for.

CRISISWORKS TIP

Only use tags where fields won't do the job. It's better to create a Sub Category for Fencing services, rather than tag lots of offers 'fencing'

Use case: a caravan park owner offers four onsite family cabins for a month at a time for the next three months. Create one Offer based on one cabin for one month, then copy the record to create a separate offer for each cabin for each one month period of time. That way, you will be able to allocate each cabin separately to individual families, it can be marked as 'in use' and the details of the family entered for information.

[More on Offers](#)

Working with Offers

Some Offers will be general and open ended, for example discounted farm supplies.

In this case, the **Offer** status should be set to Available and the offer communicated to affected residents along with arrangements for accessing the offer.

Other Offers will be one off, for example accommodation. In this case, once you have matched the offer to a need:

- set the status of the Offer as *In Use*
- add a note to the Offer, for example '*Accommodation has been allocated to the Smith family, see Case #142*'.
- if the Offer becomes available again, edit the Offer record, set the Status back to *Available* and, again

CRISISWORKS TIP

Did you know, you can add hyperlinks to records around Crisisworks? Just right click on the record ID number (in the list view) select Copy, then Paste into the detail field of the record where you want the link to show.

add a note, eg. 'the Smith family no longer require, accommodation will be available again from <date>'.

ASIDE: Use case: a business offering discounted or free services to affected people. This Offer should be entered as one item with the Status set to Available, and people can be referred directly to the business. Other offers may only have a single use, such as a donated trailer - in this case, the offer can be marked as Closed or Unavailable once it has been allocated.

Declining an offer

Offers entered directly from the public on the public offers form, will come into Crisisworks with a status of 'Under Review' so they're easily identified. If an offer needs to be declined, you may wish to contact the offerer to explain the reasons - this will help to manage community goodwill. Then add a note to the Offers record and set the Status to Closed.

Managing community goodwill: Communities often respond to emergency events with great generosity. This generosity can be an incredible resource for impacted residents and it can also be overwhelming. Here's some things you can do to help maintain that goodwill:

- *Be clear in your workflow which offers you will accept, which you will divert to other agencies and which ones you will accept and coordinate.*
- *Try and get back to the offerers in a timely manner, let them know what's happening with their offer.*
- *Communicating with offerers...*

Help from the Knowledge Base

- [More on Offers](#)
- [More on Public Offers and Spontaneous Volunteering](#)

- [More on activating a public page for Offers and Spontaneous Volunteering](#)
- [More on generating a QR Code for public forms](#)

Training and exercises

The following training injects can be used to train users on this playbook.

These should be localised to be realistic

#	For	Scenario
1		
2		
3		

Further reading