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Operating a Shelter Checklist

August 2016
Version 1.0

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Introduction

Purpose

This document provides a quick reference tool for American Red Cross shelter managers to open, operate, and close a Red Cross managed shelter. In the event that a trained shelter manager is not available or their arrival is delayed, an individual with little or no previous shelter experience should understand the critical tasks to be accomplished and be empowered to initiate action by following the sequence of items noted in this document. This checklist is not intended to serve as a replacement for the prescribed training and experience required to become a Red Cross shelter manager.

This checklist is in alignment with the **Sheltering Standards and Procedures** and job tools and is intended to:

- Encourage a culture of customer service while immediately meeting the needs of clients.
- Encourage flexibility and innovative thinking to ensure that priorities are addressed.
- Ensure that the process of running a shelter does not interfere with the goal to offer a welcoming and comfortable environment.

Audience

This guide is for individuals who will serve as the shelter manager or fill that role until an assigned shelter manager arrives. The shelter manager's supervisor is typically the Sheltering lead at a district or operations headquarters, but it may also be the Mass Care lead, regional disaster officer, or someone else, depending on the size and structure of the operation. If it is unclear who is acting as your supervisor, ask the person who assigned you to your role.

Leadership Intent

During the initiation of a response, a shelter manager's focus should be on delivering immediately-needed services to clients and communities, as well as building a unified team that will work to:

- Immediately meet client and impacted community needs.
- Care for and ensure the safety of the workforce.
- Collaborate with community and government partners.
- Accommodate the complete service needs of all clients, including individuals with access and functional needs and people with disabilities.

When to Use This Guide

This guide can be used at any time to manage the resourcing, opening, operating, and closing of a shelter.

How to Use This Guide

This document is a checklist companion to the **Job Tool: Operating a Shelter.** The content is organized into a basic sequence of activities for resourcing, opening, operating, and closing a shelter. These activities will likely overlap in time, so repeat steps as needed.

Regardless of timing, refer to the section that corresponds to the task you need to perform.

In the event that conditions do not initially permit the completion of all steps as listed, you are primarily responsible for ensuring a safe sheltering environment. When time and conditions allow, go back and complete tasks while maintaining the spirit and intent of the outcome, always thinking of clients first. <u>***Critical actions in each step begin with an asterisk (*) and are in bold, underlined italics for prioritization***</u>**.**

Legend
References to other documents are **bolded**
Referrals to other areas within this document are *italicized*
Critical actions for prioritization are <u>***asterisked (*), bolded, underlined, and italicized***</u>.

The following references apply to every step in this guide:

Sheltering Standards & Procedures
Job Tool: Operating a Shelter

Step 4.4 - Close the Shelter

Close the shelter, and return it to the facility owner or representative.

- ☐ Close the shelter to clients. Post “Closed” sign on door with contact information, including a phone number to call for assistance.
- ☐ <u>****Conduct the closing inspection with facility owner or representative***</u> using the **Facility Opening and Closing Checklist.**
  - ☐ Advise supervisor if any damage caused by Red Cross use of the facility is noted.
- ☐ Return facility to owner.
  - ☐ Meet with the facility point of contact to complete final paperwork.
  - ☐ Return keys.
- ☐ <u>****Request that the shelter status be set to “Closed” in the National Shelter System.***</u>
- ☐ Submit final documents.
  - ☐ Collect sheltering documents created or used during the shelter operation and forward them to your supervisor for disposition.
- ☐ Return Mass Care Procurement Card, receipts, Red Cross cell phone, and/or laptop to your supervisor
- ☐ Evaluate, thank, and release or transfer remaining workers by revisiting *Step 4.3 Transfer or Out-process Staff* above.

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Step 4.3 - Transfer or Out-process Staff

Transfer workers to other parts of the operation, or release and properly out-process them when the shelter is closed.

- ☐ ***Determine whether workers will be transferred or released.***
  - ☐ Workers may be needed at other shelters or in other activities.
  - ☐ Consult with your supervisor to determine whether workers will be transferred to another shelter or function or if they will be released.
- ☐ Complete the **DRO Work Performance Evaluation.**
  - All workers who have worked for seven days or more receive a performance evaluation at the end of their assignment, regardless of whether they are being released from the operation or transferred to another assignment. Workers may request an evaluation if they have worked three days or more.
- ☐ Assist workers with out-processing.
  - ☐ Provide original copy of the **DRO Work Performance Evaluation** to the worker.
  - ☐ Forward the **DRO Member Registration** documents to Staff Services.
  - ☐ Ensure that any **DRO Staff Action Reports** have been uploaded by the person preparing the report, and forward the information to the worker's home region.
  - ☐ Destroy all other staffing documents upon shelter closing.
  - ☐ Personally thank each worker.

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Step 1 - Resourcing the Shelter

Overview

Prepare to meet clients' needs when the shelter opens by making basic assumptions about the people you expect to shelter. Gather information, then plan and allocate resources to be in the position to best meet the needs of clients.

Step 1.1 - Gather Information

Collect available information to help anticipate the needs of clients and provide them with the best possible service during their stay in the shelter.

- ☐ Coordinate with your supervisor to gather information and ensure consistent, daily communication of reports, status, and needs.
- ☐ ***Collect information regarding the situation:***
  - ☐ Ask your supervisor for information regarding the disaster or event causing the shelter need.
  - ☐ Review all available operational reports, including incident action plans, situation reports, and local response plans, to gather information about the current situation.
  - ☐ Additional sources of information include impacted community members, fellow responders, local businesses, first responders, and shelter facility point of contact.
- ☐ ***Collect facility information***
  - ☐ If a **Facility Use Agreement** and **Shelter Facility Survey** have not been done, complete both prior to using the facility as a shelter. Refer to the **Facility Management Standards and Procedures.**
  - ☐ If the **Facility Use Agreement** holds the Red Cross responsible for cleaning, trash removal, and other services and utilities for the building, request these services using a **Disaster Requisition form (F6409).**
  - ☐ Refer to the **Shelter Facility Survey Instructions** for details on what makes the facility accessible.
  - ☐ Conduct a pre-occupancy inspection using the **Facility Opening and Closing Checklist**. Document areas of the facility that are available for Red Cross use, as well as any pre-existing damage to the facility.
- ☐ Communicate with your supervisor, workers in the shelter, clients, and visitors to gain an initial understanding of potential clients.

Step 1.2 - Make Assumptions About Clients' Needs

Use the information you have gathered to anticipate the needs of clients. If no information is available, refer to the considerations below to assist in drafting your initial plan and determining what resources you need.

- ☐ ***Review the planning assumptions*** for potential clients' needs, including:
  - ☐ Basic human necessities including food, water, sanitation, safety, and clothing needs.
  - ☐ Health needs including injuries, medications, durable medical equipment, and consumable medical supplies.
  - ☐ Mental health needs including trauma and stress, as well as individuals with autism, PTSD, or cognitive impairments.
  - ☐ Access and functional needs, including disabilities. Plan for at least 30% of a shelter population having some kind of access and functional need or disability.
  - ☐ Information needs including available resources and disaster recovery information.
  - ☐ Service animals, assistance animals, and pets including need for locations of pet shelters, as well as supplies for service animals.
  - ☐ Age including the number of people over the age of 65 and the number of children.
  - ☐ Culture including ethnic, religious or cultural customs, such as those that restrict physical contact between strangers, limit which family members should be consulted, interpret gestures or behaviors differently, or affect the type of information that should be shared with strangers.
  - ☐ Gender and gender identity including service considerations for individuals of all genders and gender identities. American Red Cross recognizes the gender with which a client identifies.
  - ☐ Reunification for individuals separated from family and friends.
  - ☐ Language including the need for translators and sign language interpreters.
  - ☐ Unaccompanied minors and separated children, including local procedures and resources.
- ☐ ***Gather information on the impacted community to determine the effects on your assumptions of clients' needs***, including:
  - ☐ Disaster information including the type, magnitude, and location of the disaster.
  - ☐ Number of individuals impacted by the disaster, including the number likely to need sheltering.
  - ☐ Community demographics including socio-economics, disabilities, age distributions, and cultural diversity.
  - ☐ Weather and climate including extreme temperatures.

Step 4.2 - Return Facility to Pre-shelter Condition

Coordinate with logistics and the shelter facility point of contact to ensure the shelter facility and material resources are returned to their original state or disposed of properly.

- ☐ Inventory supplies and equipment using the **Shelter Inventory** form.
  - ☐ Identify which equipment and supplies belong to the facility or other owners.
  - ☐ Notify Logistics when inventory is complete.
- ☐ Remove Red Cross equipment, signage, and unused supplies.
  - ☐ Coordinate with your supervisor and Logistics on the return of equipment, disposal of items, and discontinue of services.
  - ☐ Return the **Shelter Supply Kit**, if used, to the chapter for replenishment.
  - ☐ Coordinate with the worker assigned to feeding for the return or disposal of food.
- ☐ Coordinate with your supervisor and Logistics to return supplies and equipment belonging to other owners.
- ☐ Clean the shelter.
  - ☐ Request cleaning supplies using a **Disaster Requisition Form (F6409)** 3 days prior to shelter closing date.
  - ☐ Assign cleaning task to workers.
  - ☐ Request cleaning services through the resource request process, if needed. Refer to **Facility Use Agreement** for notes about cleaning.

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- [ ] Coordinate closing with internal and external partners:
  - [ ] Coordinate messaging with your supervisor.
  - [ ] Confirm that facility point of contact is aware of planned closure.
  - [ ] Verify with your supervisor that partners have been notified.
  - [ ] Coordinate closure with external partner representatives in the shelter.
- [ ] ****Provide resource information to clients as they depart***, including:
  - [ ] Red Cross recovery and preparedness information
  - [ ] Local Red Cross contact information
  - [ ] Available community resources
  - [ ] Information on how to volunteer
  - [ ] A personal goodbye to each client at departure

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  - [ ] Cascading effects such as mudslides from flooding.
  - [ ] Damages to critical community infrastructure. For example: impacted hospitals, utilities, roadways, sewer and sanitation, and communications systems.
- [ ] ****Make assumptions on clients' needs***
  - [ ] Evaluate the information gathered and determine potential client needs.
  - [ ] Consider requirements to meet the needs of the impacted populations.
  - [ ] Communicate with your supervisor to get updated and ongoing information that might change assumptions.

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Step 1.3 - Develop and Communicate the Shelter Plan

Use the collected information, shelter facility information, and anticipated client needs to develop a comprehensive shelter plan designed to meet the needs of clients.

- ☐ Identify and prioritize client services based on known and anticipated client needs.
- ☐ Collect facility data to assess limitations and gaps (accessibility issues, number of showers toilets, space for the provision of services). Request the following data sources from your supervisor, if needed:
  - ☐ Facility personnel contact information;
  - ☐ National Shelter System (NSS) data;
  - ☐ **Shelter Facility Survey**;
  - ☐ **Facility Use Agreement**;
  - ☐ Facility floor plans.
- ☐ Map out service delivery areas.
  - ☐ Develop a layout for where services will be provided, with the first priorities being space for feeding and providing 24-hour access to snacks, bathroom facilities, dormitory space, reception, information, and a private area for Disaster Health Services and Disaster Mental Health Services.
  - ☐ Understand the community's plan for pet sheltering, prepare to provide referrals as needed, and establish location for co-located or adjacent pet areas when appropriate.
  - ☐ Inform facility personnel of the layout of services.
  - ☐ ****Ensure that service delivery areas are clearly identified and accessible to all clients and workers.***
    Example*: Post signs identifying each service area within the shelter; ensure routes within the facility are free from clutter and that at least one wheelchair accessible bathroom is available.*
- ☐ Create and document a shelter plan using data collected for services provided, the shelter facility, and needed resources. The shelter plan should include:
  - ☐ Communications between the shelter and district or operation headquarters;
  - ☐ Prioritization of work and resources;
  - ☐ Site layout;
  - ☐ Plan to address resource gaps and limitations;
  - ☐ Coordination needed with partners;
  - ☐ Set-up tasks for workers;
  - ☐ Plan for responding to shelter emergencies, including an evacuation plan;
  - ☐ Instructions for use of facility equipment, such as generators.
- ☐ Communicate the shelter plan to the shelter team, Mass Care leadership, operational leadership, and facility point of contact.

Step 4 - Close the Shelter

Overview

Ensure clients' needs are met prior to closing the shelter, that workers are informed and satisfied with their assignment time in the facility, and that the facility owner or representative is satisfied with our treatment of their facility and respect for their property.

Step 4.1 - Prepare for Closure

Complete the following steps to prepare the shelter for closure:

- ☐ Verify that client housing needs have been met
  - ☐ Workers should interact and actively communicate with clients on an ongoing basis to gain an understanding of individual circumstances.
- ☐ ****Determine whether or not the shelter is ready for closure*** through conversation with your supervisor and other parties, as appropriate.
  Some considerations include:
    - ☐ Number of clients
    - ☐ Client needs met
    - ☐ Incident or event factors
    - ☐ Availability of the facility
    - ☐ Availability of other shelters
  - ☐ If the shelter is still needed, return to *Step 3.0 Operate a Shelter* above.
- ☐ Create a plan to close the shelter.
  - ☐ Plan how to notify clients of shelter closure.
  - ☐ Plan to notify to Feeding to ensure coordination of last meal service.
  - ☐ Plan to notify Logistics of shelter closing and vehicles needed.
  - ☐ Assess need for on-site Client Casework, Disaster Health Services, Disaster Mental Health, and Disaster Spiritual Care on day of closure and communicate those needs with your supervisor.
- ☐ ****Make shelter closure notifications within the shelter:***
  - ☐ Inform clients and workers verbally of closure at the daily shelter meetings.
  - ☐ Post shelter closing announcement with date and time.

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Step 3.5 - Shelter Reporting

Collect data and deliver a report about your shelter to assist with service delivery decisions.

- ☐ Ask your supervisor for current reporting requirements. The data and notifications could be made verbally or in writing at scheduled time(s) each day or following urgent requests.
- ☐ Establish reporting structure
  - ☐ Determine who is collecting what data and when.
    - ☐ The group providing services or items *directly to the client* is responsible for reporting data about number of items they provided according to county.
    - ☐ Assign a point person in each area to complete data collection tasks: a shelter worker at the registration table reports all new registrations, a team member working in the dormitory to reports the number of people in the shelter, and a worker in the feeding area reports the number of served for that reporting cycle.
- ☐ ***Collect the reporting data:***
  - ☐ Track the following information throughout your shift (or as requested by your supervisor) and record the information on the **Daily Shelter Report**:
    - ☐ Number of new clients registered since the last report
    - ☐ Dormitory population at 11:00 p.m., including age demographics
    - ☐ Number of snacks and meals served by shelter team
    - ☐ Number of comfort kits, clean-up kits, and other bulk items distributed
    - ☐ Number of shelter workers
  - ☐ Track the following information and submit to your supervisor:
    - ☐ Supply needs
    - ☐ Emergency welfare inquiries made at the shelter
    - ☐ Unusual situations (injuries, theft, visits by dignitaries, etc.)
    - ☐ Safety and security needs (law enforcement activity including 9-1-1 calls). Immediately report any instance that impacts the safety and well-being of individuals in the shelter to your supervisor, and call 9-1-1, if needed.
- ☐ Produce Required Reports. Complete forms (if specified) or lists of reporting data according to your supervisor's instructions.
- ☐ Submit reports as directed by your supervisor. In some cases, reports may be given verbally, via email or via text.

Step 1.4 - Determine Resource Requirements

Calculate the human and material resources needed to provide services to clients in the shelter.

- ☐ Determine human resources needed to provide service delivery using the **Job Tool: Shelter Staffing**. Ensure there are personnel available for shelter set-up, maintenance and administration, daily operations, and to provide services.
  - ☐ Determine:
    - ☐ Number of personnel based on number of anticipated clients and the extent of their needs;
    - ☐ Services to be provided using the facility layout as a guide;
    - ☐ Number of shifts used, two or three.
- ☐ Determine material resource needs to provide service delivery using the **Job Tool: Shelter Supply Template.**
  - ☐ Determine the quantity and type of materials needed, based on the number of anticipated clients, the services to be provided, and shelter shifts.
  - ☐ Ask your supervisor what procurement methods are appropriate for material resources: Logistics Support, P-Card, or Mass Care Procurement Card.

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Step 1.5 - Acquire workers

Assess the available human resources within the local community, request additional staff to meet any staffing shortfalls, assign roles and responsibilities to staff, and equip staff to be successful in their assigned roles and ultimately meet client needs.

- ☐ If there are any workers, community members, partner agency members, or clients who are willing to help in the shelter, assess shelter staffing capability and capacity using these individuals.
- ☐ ****Assign roles or tasks to existing human resources:***
  - ☐ Provide workers an orientation about the disaster response and about the specific role they will assume.
  - ☐ Equip workers with the tools necessary for their role or task.
- ☐ ****Determine shortfalls in staffing:***
  - ☐ Calculate non-shelter workers needed in the shelter. For example: Disaster Health, Disaster Mental Health, and Disaster Spiritual Care Services.
  - ☐ Calculate number of shelter workers needed to fill roles and tasks. For example: registration, dormitory, feeding, and security.
  - ☐ Contact your supervisor to communicate your staffing needs.
- ☐ ****Request additional staff as needed*** using the **Staffing Request Form.**
  - ☐ Verify that the staffing request is submitted and in progress.
- ☐ Receive additional workers, and assign roles and tasks as they arrive.
  - ☐ Greet each worker with a warm welcome, and provide your full attention.
  - ☐ Get to know each worker:
    - ☐ Verify worker is at the correct assigned location.
    - ☐ Interview worker to assess skills and knowledge to ensure they have the appropriate background for their shelter assignment.
    - ☐ Make sure each worker is comfortable with their assignment.
    - ☐ Ensure that worker knows who to report to.
  - ☐ Document information about the worker, especially contact information.
  - ☐ Give the worker an orientation, and equip them with tools necessary for their role or task. For example, give a worker assigned to the task of cleaning cots a copy of the **Cot Cleaning Instructions**, a scrub brush, detergent, and access to water.

- ☐ Check signs periodically to make sure they still look good and are legible. Replace them, as needed—especially after rain and heavy winds.
- ☐ Conduct perimeter walks and interior walks to cover all areas of the facility. During shifts at night, inspect parking areas used by clients and workers.

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Step 3.4 - Operate and Maintain the Facility

Oversee the use, ongoing maintenance, and safety of the shelter facility during the shelter operation. Some or all of these responsibilities can be delegated to a worker.

- ☐ Manage the facility.
  - ☐ Maintain communications with the facility representative throughout the shelter operation to discuss and resolve any problems. Explain the services Red Cross is providing, and identify any partners with whom Red Cross is working. Ask facility representative whether there is anything Red Cross workers could do differently.
  - ☐ Inventory and secure that supplies and equipment belonging to the facility.
  - ☐ Estimate and meet ongoing supplies and equipment needs.
  - ☐ Conduct facility shift inspections.

- ☐ ***To maintain a secure shelter environment, monitor and control access to entrances and exits to shelter areas:***
  - ☐ Secure unused doors that are not emergency exits.
  - ☐ Patrol dormitory area and surrounding areas to make sure dormitories remain safe.
  - ☐ Monitor and control traffic flow in the parking area.
  - ☐ Control access to shelter storage areas.

- ☐ Continue to track supplies and equipment being used in the shelter:
  - ☐ Inventory and track equipment and supplies belonging to the facility using the **Shelter Inventory** form**.** Relocate or secure facility-owned items that are not for shelter use.
  - ☐ Verify inventory counts as supplies are removed from inventory.
  - ☐ Conduct inventory counts regularly.

- ☐ ***Conduct facility inspections during each shift:***
  - ☐ Use the **Shift Inspection** form to conduct inspections at the beginning of each shift and report any problems to the shelter manager, who will report it to their supervisor and the facility representative. When inspecting the shelter, check for the following:
    - ☐ Lack of accessibility for all clients, workers, and visitors
    - ☐ Signs of excessive wear and tear
    - ☐ Inappropriate use
    - ☐ Operational deficiencies
    - ☐ Obstructed emergency exits
    - ☐ Hazards, including fire hazards
    - ☐ Any other problems
  - ☐ Use the **Shelter Facility Survey** to make sure that accessible routes throughout the shelter have not been obstructed.

Step 1.6 - Acquire Material Resources and Services

Assess and acquire necessary material resources and services to meet the needs of clients, equip the shelter facility, and support workers as they engage in client services.

- ☐ ***Assess existing available resources on site:***
  - ☐ Use the **Shelter Inventory** form to inventory facility-owned material resources and Red Cross material resources to determine what resources are immediately available to use.
  - ☐ Refer to the **Facility Use Agreement** and **Shelter Facility Survey** to ensure that existing on-site material resources are available for shelter use. Examples include facility kitchen equipment, tables and chairs, room dividers, toys, children's supplies, entertainment equipment, gym floor covering, and generator.
  - ☐ Confirm available resources with the facility point of contact.
  - ☐ Based on the resources available and the resource needs identified in the shelter plan, determine resources that need to be acquired immediately and then assess resource needs for the next 3 days. At the appropriate time, assess resource needs for the next 7-10 days.

- ☐ Stage existing resources within shelter area based on the site layout in the shelter plan:
  - ☐ Examples: post shelter signage, set up enough cots to meet initial need
  - ☐ Use the **Shelter Inventory** to document existing resources.

- ☐ ***Request remaining needed materials and services*** using a **Disaster Requisition (F6409)**.
  - ☐ Submit a disaster requisition to your supervisor for approval and routing to Logistics.
    - ☐ If your supervisor instructs you to purchase materials locally, use a regional P-card, Mass Care Procurement Card, or other appropriate purchasing method as outlined in **Procurement Standards and Procedures**.
    - ☐ ***SAVE ALL RECEIPTS.***

- ☐ Ask your supervisor for updates on the status of your requests if Logistics is procuring materials.

- ☐ Receive additional materials:
  - ☐ Verify that the materials you received match the amounts and type you requested.
  - ☐ Document receipt in the **Shelter Log** and **Disaster Requisition (F6409).**
  - ☐ Keep all packing lists, and match them with the **Disaster Requisition (F6409)** and receipts.
  - ☐ Notify your direct supervisor of any discrepancies.

- ☐ Stage additional materials according to space layout and the provision of services:
  - ☐ Identify space to store material resources that will not be used immediately.
  - ☐ When directing workers to stage resources, provide them with the following:
    - ☐ Description of materials that will be distributed to clients (e.g., comfort kits, clean up kits).
    - ☐ Description of equipment used to provide services (e.g., cambros, kitchen equipment, cots) and instructions for use.
  - ☐ Address safety issues involving material resources, such as exposed power cords, pallet jacks, kitchen equipment.

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Step 3.3 - Manage Workers

Ensure all workers are supervised, informed, and work in a positive sheltering environment.

- ☐ Maintain staffing schedules.
  - ☐ Create a schedule of shifts, including days off, to ensure coverage for all services provided in the shelter.
  - ☐ Create a table of organization, and display it where all workers can access to it.
  - ☐ Adjust staffing requirements to meet the needs of the shelter.

- ☐ Conduct staff meetings.
  - ☐ Staff meetings are essential to a good shelter operation. These meetings provide an opportunity to share information about the operation, to build the shelter team, and to improve service to clients.

- ☐ ****Supervise workers***
  - ☐ Provide overall supervision, direction, and leadership.
  - ☐ Empower workers to provide quality service to clients.
  - ☐ Encourage workers to interact with clients so they gain an understanding of specific client needs.

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3.2.3 - Manage Community Members Arriving to Help

Ensure that community members and shelter clients who want to help are directed, received, and resourced to the appropriate area. An offer of time should be appropriately handled and appreciated. All workers should know how to complete the following tasks.

- ☐ ***Greet community member*** warmly with a smile. Focus on the individual, offering your complete attention.
- ☐ ***Receive and resource community members who are not clients in the shelter:***
  - ☐ Community members who are not clients in the shelter and want to help are considered event-based volunteers and are treated, processed, and supported in the same manner as all other responders on an operation.
  - ☐ If a community member arrives at the shelter to help without in-processing through Staff Services, refer them to the region or to Staff Services for volunteer in-processing.
  - ☐ Receive and resource a community member as an event-based volunteer. Revisit *Receive additional workers and assign roles/tasks as they arrive* in *Step 1.5 Acquire Workers* above.
- ☐ ***Engage clients who want to help in the shelter.***
  - ☐ Clients who are willing to help with sheltering tasks are a great resource. Recruiting clients as helpers allows them to contribute to their own recovery and creates a positive and cooperative environment at the shelter.

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Step 1.7 - Set up the Shelter

Complete all preparation and planning to provide service delivery at the shelter. This includes ensuring the shelter set-up is complete, supplies are received and ready to use, and staff is oriented, trained, and assigned to roles.

- ☐ Verify that staff, material resources and support services are established.
  - ☐ Address all tasks outlined in the shelter plan.
  - ☐ Work with your supervisor to synchronize activities with partners, vendors, and service providers.
- ☐ ***Set up areas for providing services that are accessible to all clients.***
  - ☐ The following core services are provided in every shelter, regardless of size or duration:
    - ☐ Reception
    - ☐ Dormitory registration
    - ☐ Dormitory
    - ☐ Information area
    - ☐ Feeding
    - ☐ Disaster health services
    - ☐ Disaster mental health services
    - ☐ Disaster spiritual care services
    - ☐ Reunification
    - ☐ Distribution of emergency supplies
    - ☐ Security
  - ☐ The following situational services are services set up based on the needs of clients:
    - ☐ Casework and recovery planning
    - ☐ Direct client assistance
    - ☐ Child respite care
    - ☐ Laundry
    - ☐ Recreation
    - ☐ Quiet areas
    - ☐ Breastfeeding and diapering areas
    - ☐ Facilitating access to services provided by partner agencies.

    Note: Exact services provided in the shelter depend, in part, on the scale and needs of the affected individuals and community.
- ☐ ***Post shelter signage, ensuring that all signs are accessible to everyone*** including language, symbols, font size, and location:
  - ☐ Outside: include accessible signage to identify the facility as a shelter and direct clients to the accessible entrance. Post a sign stating that service animals are welcome.
  - ☐ Inside: include accessible signage that identifies all exits, restrooms, and areas where services are being provided.

- ☐ Set up areas for staff and support services:
  - ☐ Set up office and work space for the shelter manager, supervisors, administrative support, and in larger shelters, areas for workers doing staffing and logistics functions.
  - ☐ Set up areas to receive and store material resources delivered to the shelter.
  - ☐ Set up staff respite area.
- ☐ Communicate that shelter is ready for "Open" status.
  - ☐ Inform your supervisor, all shelter workers, and facility management that the shelter is ready to be opened. Your supervisor will notify operational leadership, clients, partners, and stakeholders.

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Step 3.2 - Address Offers From the Community

Ensure workers know how to handle offers from the community and the donors feel like offers are handled appropriately. Ensure that a worker assigned to handle offers from the community completes the following tasks.

3.2.1 - Manage In-Kind Donations

- ☐ ***Greet the donor warmly*** with a smile. Focus on the donor, offering your complete attention.
- ☐ ****Assess each donation.***
  - ☐ Considering the needs of clients in the shelter, in collaboration with your supervisor and the In-Kind Donations function, determine if the donation presented is appropriate for use at the shelter or another service delivery location.
- ☐ Identify where or to whom the donation should be directed.
- ☐ Direct each donation to the appropriate destination.
  - ☐ If the appropriate destination is within the shelter, accept the donation, and thank the donor.
  - ☐ If the appropriate destination is another service delivery location or a partner agency, refer the donor to the specific individual at the receiving location. Thank the donor.
  - ☐ If the donation is not appropriate, suggest the donor find another worthy recipient, thank them for thinking of American Red Cross, and document the offer.
- ☐ ****Thank the donor***, explain how the donation will be used, and express appreciation.
- ☐ Document donation properly:
  - ☐ Record any donations accepted at the shelter using the **In-Kind Donations Resource Record.**
  - ☐ Record any unaccepted offer in the **Shelter Log.**
  - ☐ ****Report all in-kind donations daily for inclusion in the operational reports.***

3.2.2 - Manage Monetary Donations

- ☐ ****Greet the donor warmly*** with a smile. Focus on the donor, offering your complete attention.
- ☐ ****Direct donation to appropriate destination*** by encouraging donors to mail or deliver financial donations to the regional office, donate online at www.redcross.org or donate through the Red Cross Emergency App.
- ☐ ****Thank the donor*** and express appreciation for their donation.

- [ ] Every worker in the shelter should gain an understanding of clients' specific disaster-related needs.
  For example:
  - *Through conversation, a worker discovers that a client with a dietary issue is not eating the shelter meals because she was afraid to mention it during registration.*
  - *A client who is sitting in a chair every night instead of sleeping on a cot cannot sleep laying flat due to a breathing problem.*
  - [ ] If client needs are identified, determine where clients should be directed to receive the appropriate services.

- [ ] Direct clients to appropriate services.
  - [ ] If appropriate services are already available within the shelter, direct the client to the service. For example, ensure that a client who needs a stable power source for medical equipment has access to an electrical outlet and that the shelter's emergency generator will provide uninterrupted power.
  - [ ] If appropriate client services can be offered at the shelter by bringing in additional resources, return to *Step 1.6: Acquire Material Resources and Services*.
  - [ ] If resources cannot be provided at the shelter, or an appropriate service is available in another service delivery location or by a partner agency, then assist client (and their caregiver) in determining other options and make referrals as necessary.
    For example, if clients need access to laundry services, work with your supervisor to locate laundry service options in the community and refer clients to those services.

- [ ] Provide ongoing and additional services based on the needs of clients. For example, if young children are in the shelter, set up a child respite area and recreation area to meet the children's needs

- [ ] Conduct regularly scheduled shelter meetings with clients.
  - [ ] Review shelter rules and issues, discuss volunteer opportunities in the shelter, give disaster updates, and share recovery information.
  - [ ] Provide updated safety information.
  - [ ] Ensure that all information is communicated in ways that are accessible to everyone in the shelter.

- [ ] If clients have any other immediate or anticipated needs, return to the *Identify and prioritize clients' immediate needs* item in *Step 2.2 – Welcome Clients Into Shelter* step above.

- [ ] Ensure clients understand available services, what they can expect in the sheltering environment, and how to get additional information or assistance.

Step 2 - Open the Shelter

Overview

Ensure that clients are welcomed with care and concern and provided with dormitory and feeding, information is shared with clients and workers, and donations are managed appropriately.

Step 2.1 - Officially Open Shelter

Officially open the shelter, including notification to clients, government and non-government partners, and the general public. Complete the following tasks:

- [ ] Notify your supervisor of shelter's open status:
  - [ ] Inform your supervisor, all shelter workers, and facility management that the shelter is open and services have been initiated. Your supervisor will notify Mass Care leadership, operational leadership, clients, partners, and stakeholders.

- [ ] ***Request that the shelter status be set to "Open" in NSS,*** so clients, partners, and the public know where to receive Red Cross services.

- [ ] ***Physically open the shelter entrance***, ensuring that the entrance and routes to all services are wide enough to accommodate all individuals and are free of hazards including protruding objects.

Notes:

Step 2.2 - Welcome Clients and Visitors Into the Shelter

Welcome clients with care and concern, ensure their immediate needs are met, and inform them what they can expect in the sheltering environment. Ensure that a worker assigned to the reception area completes the following tasks:

- [ ] ****Welcome clients and visitors:***
  - [ ] Warmly and calmly greet clients and visitors, showing compassion and empathy.
  - [ ] Focus on the individual – offer your complete attention.
  - [ ] Remember that service to the client comes first.
  - [ ] Have everyone sign in to the shelter using the appropriate form: **Client Sign-in** or **Visitor Sign-in.**
- [ ] ****Identify and prioritize clients' immediate needs:***
  - [ ] Refer to the **Shelter Rapid Needs Recognition Card** to make observations and ask questions to assist clients in identifying immediate needs, such as medical, emotional, behavioral, and access and functional needs.
  - [ ] Make observations and ask questions to assist clients in identifying their needs, such as food, information, communication, a place to sleep, and reunification with family members.
- [ ] Assess resources to meet clients' immediate needs:
  - [ ] If resources to meet a client's immediate needs are not available at the shelter, refer to *Step 1.6: Acquire Material Resources and Services,* and meet client's needs as soon as resources become available.
- [ ] Orient clients to the shelter:
  - [ ] Provide clients with expectations and information appropriate to their needs.
  - [ ] Provide clients with a **Client Welcome Handout,** and ensure they understand it.
  - [ ] Orient clients to the shelter, making sure clients are provided a tour of the shelter or otherwise directed to where services are being provided in the facility and surrounding property.
- [ ] ****Meet clients immediate needs:***
  - [ ] Assess known resources for client needs, including services provided in the shelter or community and resources available for coordinating self-care.
  - [ ] Direct client to the appropriate service needed.
- [ ] If the clients have any other immediate or anticipated needs, return to the *Identify and prioritize clients' immediate needs* item above.
- [ ] Ensure clients understand available services, what they can expect in the sheltering environment, and how to get additional information or assistance.

Step 3.0 - Operate a Shelter

Overview

Ensure that our clients and others staying at the shelter are safe, have their immediate disaster-related needs met, and receive the most comfortable shelter experience possible until their departure.

Step 3.1 - Provide Ongoing Services

Meet clients' current and evolving disaster shelter-related needs.

- [ ] Gather information on changes that may affect clients:
  - [ ] Access reliable information from a variety of sources, including your supervisor, law enforcement, etc. Be aware of any rumors that need to be addressed.
  - [ ] Ensure that a worker continuously repeats *Step 2.5 – Inform Clients and Workers* to keep information up to date.
- [ ] ****Reassess additional resource needs of the shelter***
  - [ ] Evaluate the evolving needs in the shelter and the current incident status. Sample situations that may influence resource needs in the shelter include:
    - Local law enforcement advises that a senior mobile home community of 110 is being evacuated and referred to the shelter. Average age of the clients is 83. They will arrive in time for the evening meal.
    - The power company advises that power in the affected community has been restored, and only 10% of the population remain in need of sheltering.
- [ ] ****Determine if additional resources are required***. Sample resourcing considerations include:
  - If additional cots are needed for a population increase: Are there empty cots? Can used cots be cleaned? Is there an unopened shelter trailer in the parking area?
  - If additional workers are needed: Are any current clients interested in assisting with tasks in the shelter?
  - If disaster conditions have changed: Is the shelter still in a safe location?
- [ ] ****Assess additional client needs***
  - [ ] Through conversation and observation, regularly determine if clients have unmet, disaster-related needs.

Step 2.6 - Provide Disaster Health, Disaster Mental Health, and Disaster Spiritual Care Services

Provide clients and workers with necessary services, including those offered by the Disaster Health Services, Disaster Mental Health, and Disaster Spiritual Care functions. Ensure that a lead worker from each function completes the following tasks:

- ☐ ****Assist clients in identifying health, mental health, and spiritual care needs.***
  - ☐ Use **Shelter Rapid Needs Recognition Cards** to make observations and ask questions to assist clients in identifying immediate medical, emotional, behavioral, and access and functional needs including any disabilities.
- ☐ ****Direct clients to the appropriate service***.
- ☐ If clients have any other immediate or anticipated needs, return to the *Identify and prioritize clients' immediate needs* item in *Step 2.2 – Welcome Clients Into Shelter* step above.
- ☐ Ensure clients understand available services, what they can expect in the sheltering environment, and how to get additional information or assistance.

Notes:

Step 2.3 - Provide Dormitory Services

Provide clients with a safe place to sleep that is accessible to them and meets their sleeping needs. Ensure that a worker assigned to the dormitory completes the following tasks:

- ☐ ****Register clients who need sleeping accommodations*** using the **Shelter Dormitory Registration Form.**
- ☐ ****Assess clients' dormitory needs***, including:
  - ☐ A cot that is appropriate size, height, and width to meet their needs;
  - ☐ Proximity to power source for medical equipment, restroom facilities, Disaster Health Services, etc.;
  - ☐ Family groupings, gender specific areas, and quiet areas;
  - ☐ Adequate space for individuals with access and functional needs, including those with disabilities.
- ☐ ****Assign space and resources to clients according to identified client needs.***
- ☐ Orient clients to the dormitory area, making sure they are provided a tour of the dormitory area and directed to where services are being provided.
- ☐ In the space that has been assigned, provide clients with their allocated dormitory resources, including one cot and two blankets.
- ☐ If clients have any other immediate or anticipated needs, return to the *Identify and prioritize clients' immediate needs* item in *Step 2.2 – Welcome Clients Into Shelter* step above.
- ☐ Ensure clients understand available services, what they can expect in the sheltering environment, and how to get additional information or assistance.

Notes:

Step 2.4 - Feed Clients and Workers

Provide clients and workers with food in a sufficient quantity to meet their cultural and dietary requirements. Ensure that a worker assigned to feeding completes the following tasks, according to guidance in the **Feeding Standards and Procedures**.

- ☐ ***Assess feeding needs.*** Identify client and worker meal requirements, including those related to dietary and cultural requirements. Identify resources to meet access and functional needs including disabilities.
- ☐ ***Arrange for and obtain appropriate meals:***
  - ☐ Determine if Feeding function needs to be activated.
  - ☐ Arrange for and obtain meals to meet identified feeding needs.
  - ☐ Adhere to local safe food handling standards.
- ☐ Orient clients and workers to the feeding area, meal options, and 24-hour snack table, making sure clients and workers are provided with a tour of or otherwise direct to the feeding area.
  - ☐ If anyone self-identifies as having an allergic reaction in the presence of certain foods, ensure that those foods are not served in proximity to the meal or snack area and that all workers are aware of the allergy.
- ☐ ***Collect and report accurate meal and snack counts for inclusion in the daily reports.***
- ☐ If clients have any other immediate or anticipated needs, return to the *Identify and prioritize clients' immediate needs* item in *Step 2.2 – Welcome Clients Into Shelter* step above.
- ☐ Ensure clients understand available services, what they can expect in the sheltering environment, and how to get additional information or assistance.

Notes:

Step 2.5 - Inform Clients and Workers

Provide clients and workers with up-to-date information. Ensure that a worker assigned to gathering, verifying, and disseminating information completes the following tasks:

- ☐ Assess information needs.
  - ☐ Identify the information needs of clients and workers, including those related to the shelter operation, the status of the disaster, and resources available in the community.
  - ☐ Determine whether any clients or workers have access and functional needs, including any disabilities that require specific communication methods, such as large print or Braille, audible messaging, or translation services.
- ☐ ***Collect information.***
  - ☐ Coordinate through the regional office or the operations headquarters to gather information regarding the disaster and resources available to clients.
  - ☐ Collect information specific to services and activities that are occurring in the shelter, including plans for responding to emergencies in the shelter.
- ☐ ***Validate the collected information,*** and address rumors that may surface in the shelter, such as when the shelter is closing, an illness spreading through the shelter, or resource availability.
- ☐ ***Provide collected information to clients and workers*** using the most appropriate method for the information and the audience. Methods include, but are not limited to:
  - ☐ Bulletin boards
  - ☐ Client and worker meetings
  - ☐ Large print and Braille documents
  - ☐ Audible method of communication
  - ☐ Interpreter Services
  - ☐ Ensure information is accurate and continuously updated.

Notes: