Shelter Field Guide
Shelter Field Guide

With contribution from:

American Red Cross
Federal Emergency Management Agency
Missouri State Emergency Management
New York City Department of Homeless Services
San Francisco Department of Emergency Management
Introduction

Operating emergency shelters helps communities respond to disasters. The Shelter Field Guide helps organizations without prior disaster experience establish and maintain shelters. This guide provides a basic overview of shelter operations and is written for people who may manage or support the operation of a shelter. Conditions may require flexibility in interpretation and application of this guide. Contact local emergency management or sponsoring agency with any questions.

The American Red Cross is the primary disaster sheltering organization in the United States. After a disaster strikes, the Red Cross is available to support shelters and include them in the Red Cross sheltering network. The organization has a well developed sheltering program and is a valuable resource to sheltering operations. The Red Cross works in partnership with local and state emergency management to provide support and maximize resources. As a shelter operator, you are encouraged to contact your local American Red Cross chapter for support at any time.

Fundamental Objectives of Sheltering

- Shelters provide a safe place for individuals and families affected by a disaster to sleep or rest and may offer, among other things, food, snacks, beverages, cots, blankets, sanitation facilities, safety, first aid and information on recovery efforts.
- Shelters provide services to all individuals and households in the community.
- Shelter staff members abide by principles of confidentiality of shelter resident information.
- Shelters strive to accommodate the varying cultural and faith-based preferences of the residents. Such requirements could include variations in sleeping, eating and living spaces, and the provision of space to meet and honor spiritual needs.
- As required by the American Disabilities Act (ADA) and other civil rights laws, shelters must accommodate individuals with disabilities and those who support them. Take steps to ensure every individual with a disability can fully use and enjoy, and be integrated into, programs, services, activities, goods, facilities, privileges, advantages, or accommodations provided by the shelter operator and their supporting organization or agency.
- Provision of acute health care that extends beyond the capacity of the shelter is provided in a medical setting such as a hospital or field hospital.
Using This Guide

**Guide Design**

This guide is designed to be used in the field throughout the cycle of shelter opening, operation and closing. It is divided into ten sections. On the right side of each page is a vertical bar to assist you in navigating the guide with ease. The sections and color-codes are as follows:

- Introduction
- Before Opening a Shelter
- Opening a Shelter
- Ongoing Shelter Operations
- Transition for Closing
- Closing the Shelter
- Checklists
- Coaching Aids
- Tools & Resources


**Position Icons**

In addition to the sectional color-coding, the guide contains information for the fundamental positions within a shelter. A set of icons has been developed representing each of the functional staffing areas of a shelter. At the beginning of each section, you will find those icons listed to which the information in the section pertains. Additionally, icons are placed above various sub-sections if the information is pertinent to the positions below:

- Shelter Management
- Registration
- Dormitory
- Feeding
- Staffing
- Logistics
- Health and Mental Health

**Training**

At the end of this guide are two sections related to training:

- Checklists
- Coaching Aids

The Checklists section contains a list of tasks for various shelter positions. These aids can be removed from this guide and given to trainees to assist them in learning their position, and the checklists can be photocopied and used to track work daily.

The Coaching Aids section provides tools for your trainers to use when training staff positions. Information on the successful training of shelter staff is provided in the Coaching Aids section.
Before Opening a Shelter

Before opening a shelter, there are a number of things to consider. Is a shelter necessary? Is the selected site appropriate for sheltering? Does the shelter site comply with the requirements of the Americans with Disabilities Act and other civil rights laws? How will the shelter be publicized and supported? Who will pay for the cost of operating a shelter?

This section of the Shelter Field Guide will help to ensure you’ve covered all the bases before opening a shelter.

**NOTE:** Contact the American Red Cross to learn more about sheltering, shelter partnering opportunities and benefits, and training that may be available near you.

### Determine if the Shelter is Necessary

Check with your local Emergency Management to see if there are other nearby shelters already operating. If there are, opening another shelter may actually be counterproductive because it might cause confusion and draw scarce resources.

### Establish Relationships with Local Emergency Management

One key to a successful shelter operation is close coordination with local emergency management and other organizations supporting shelters.

- Local emergency management often opens an Emergency Operations Center (EOC) when a disaster or significant event occurs. The local EOC is the primary coordination center for the jurisdiction.
- Identify a point of contact within local emergency management who will be working to support the shelter operation.
- The local EOC is a coordinator of services not a provider.
- Not all resources are available locally.
Complete a Site Review
To ensure a safe and healthy shelter environment, conduct an inspection of the facility prior to opening and consider the following liability, safety and security issues:

- Is the facility clean and orderly? Kitchen and bathrooms sanitary?
- Is there sufficient light in public areas?
- Are the building systems in working order (electrical, water, sewage, heat ventilation and air conditioning)?
- Are the fire extinguishers and smoke detectors in working order?
- Are indoor and outdoor walkways open and free of hazards?
- Are the emergency exits clearly identified and unobstructed?
- Is the facility accessible to children and adults who may use mobility devices such as wheelchairs or canes? Does access to and within the facility require climbing stairs?
- Are first aid kits readily available and fully stocked? Where?
- Is there an emergency evacuation plan and identified meeting place?
- Will occupants be notified that an emergency evacuation is necessary by Public Address or alarm?
- Are there any hazardous materials or equipment on-site and are they secured?
- Are there any pre-existing safety/fire hazards such as missing electrical covers, inappropriate use of extension cords, or improperly stored flammable materials?

Determine the Scope of Shelter Services Needed
Services should meet a variety of individual and community needs including:

- Culturally appropriate meals
- Health and mental health
- Assistance for:
  - Infants
  - Children
  - Elderly
  - Children and adults with access or functional support needs
  - Individuals with limited English proficiency
**Site Layout and Set-Up**
When allocating space in the shelter facility, consider establishing the following areas as well as the level of access. Some areas will need to be restricted from the general population, such as supply storage areas, classrooms, libraries or any area that has supplies or equipment that are dangerous or may be broken.

**NOTE:** Post signs indicating the building as a shelter and signs to direct people to the different areas of the shelter.

**Parking**
Identify areas for client, staff and visitor parking.

**Drop Off Area**
Keep main entrance clear for emergency vehicles and resident drop off.

**Waiting Area**
Identify an area for residents to wait to register. When possible, identify climate controlled areas, or areas that are protected from the elements. Include seats for those who are unable to stand. Make available accessible restrooms and drinking water.

**Registration Area**
Identify an area near the facility’s main entrance for registration of residents. Set up registration area:
- Position several tables and many chairs by the main entrance to receive residents.
- Allow for 1 registration worker at each table, and with enough space for limited client privacy when providing registration information.
- There should be one table for health service.
- Use only one facility entrance, if possible. Position staff at other entrances to direct shelter residents.
Dormitory

Provide areas for cots or mats. Allow 40 square feet of space per person. Consider the following:

- Ability to dim light.
- Distance from internal and external traffic.
- Independent temperature control.
- Separate spaces for families, women, men and other groups.
- One toilet for 20 persons is recommended. (1 of 6 must be accessible for people with disabilities).
- An approximate ratio of one shower for every 25 persons is recommended. (1 of 6 must be accessible for people with disabilities).
- Set up cots, blankets and pillows.

Children & Family Areas

Establish specific areas for the following:

- Child recreation area
- Diaper changing
- Breast feeding
- Bottle washing
- Temporary respite care – A supervised area for children

Household Pets

Household pets should be sheltered in distinct facilities designed to shelter animals.

Feeding/ Food Preparation & Serving Areas

If meals are produced on site, a commercial kitchen is desirable. If meals will be catered, a staging area is needed.

- Set up a beverage and snack area.
- Identify sources for food, water, feeding support materials and equipment.
- Determine when first meal will be served.
- Set up dining area that is located away from the dormitory.
- Post signage that states that no food can be taken to dormitory area.

NOTE: Ensure that all food service areas are accessible to every resident.

Plan to offer meals based on several considerations:

- Availability of food
- Convenience of procurement
- Cultural concerns
- Health condition of shelter residents
- Cost
Evaluate staffing needs in order for meal service to function in a timely manner. Consider staffing the following:

- Kitchen supervisor
- Cook and helpers
- Food prep
- Dish washers
- Servers
- Clean-up crew

**Snack Areas**
Where food and beverages are available 24 hours a day.

**Health Services & Mental Health Service Areas**
Separate areas that provide privacy for residents seeking health/mental health services.

**Lounge and/or Recreation Areas**
Establish lounge and/or recreation areas.

**Storage**
Locked storage areas are needed for food and facility supplies.

**Shelter Manager’s Office**
Private offices with telephone and computer for the shelter manager and staff preparing reports.

**Staff Area**
A private area for staff to take a break, rest or complete administrative duties.
Sample Shelter Floor Plan

Suggested Shelter Layout
Establish Shelter Rules
Below are sample shelter rules. It is recommended that shelter rules be posted in all areas of the shelter in the languages of the residents.

- No drugs, alcohol, weapons or pets.
- Smoking – Use of all tobacco products, use of matches or lighters inside the shelter is prohibited.
- Children – Parents are responsible for keeping track of and controlling the actions of their children. Do not leave them unattended.
- Personal belongings – Shelter staff cannot assume responsibility for belongings. Either lock valuables in your car, out of sight or keep valuables with you.
- Sleeping areas are quiet areas at all times of day and night. Quiet hours with lights out are enforced in the sleeping area(s) between the posted hours (e.g., 10:00 P.M. - 6:00 A.M.).
- Residents leaving the shelter for any period of time must sign in and out at the registration area.
- Keep your areas clean and help with cleanup of other area when possible. Food and drinks, other than water, are not allowed in the sleeping area.
- Be respectful and courteous to others at all times. Loud, boisterous and disruptive behavior is not permitted.
- Immediately report all health or safety concerns to shelter staff.

NOTE: Every shelter needs a shelter manager who is qualified to provide support and supervision of all functions to ensure that residents’ needs are met. It is important to delegate tasks to competent subordinates in order for the shelter to run smoothly.

Staffing
One of the greatest challenges in operating a shelter is recruiting and maintaining an adequate staff.
**Shelter Positions**
The following positions are typically needed to initially open and operate a shelter:
- Shelter Manager and Shift Supervisor
- Staffing
- Registration
- Dormitory Management
- Food Preparation and Feeding
- Health and Mental Services
- Logistics

**Considerations When Planning Staffing**
Determine the number of shelter staff needed based on these factors:
- Anticipated number of shelter residents
- Safety concerns
- Ability to secure the facility
- Anticipated duration of shelter operation
- Demographics of shelter residents such as children and people requiring functional needs support
- Lay-out of the shelter

**Forecasting Staffing Needs**
In planning for the staffing of the shelter, consider the following:
- Assign one shelter manager for the entire operation.
- Assign a Shift Supervisor for each shift.
- Assign a “Staffing” position to recruit, orient/train and track the staff.
- Assign shelter staff to lead key responsibilities. Some staff can be assigned more than one responsibility depending on the size of the shelter population.
- Determine the amount of Physical and Mental Health staff required based on the shelter population and their needs.

**NOTE:** It is recommended that at least 3 staff per shift to open a shelter including a Shelter Manager, Registration Worker and Feeding/Logistics Worker.
**Shifts**
The shift requirements of the shelter may change as the amount of available staff and the number of residents fluctuates. Plan to:
- Start up the shelter with **two 12 – hour shifts**.
- Transition to **three 8 – hour shifts** as more staff becomes available.

**NOTE:** Overnight shifts minimally should consist of a supervisor and dormitory worker(s), as well as the appropriate level of physical and mental health support.

**Scheduling**
List the tasks that need to be performed and the hours required to complete these tasks. From this, prepare a daily schedule for each job and include the number of staff needed and some of the skills required to perform the tasks.

Many of these tasks have shifting levels of activity. For example, during opening and closing, registration may require higher staffing numbers to efficiently process residents. During slower times, some registration personnel can be moved to other tasks.

**Orienting Your Staff**
In addition to providing on the job training in specific sheltering tasks, ensure your incoming staff are briefed on:
- All shelter policies and procedures
- Policies for accepting monetary donations
- Policies for accepting donations of goods

**Keeping Track of Your Staff**
Just as you would maintain records of an employee’s contact information and hours worked, it is important to track this same information for your shelter staff. Plan to track the following information of your staff:
- Contact information
- Dates/hours worked
- Type of work performed
- Location where work was performed
Before Opening a Shelter

Resident Volunteers

Often shelter residents may be willing to volunteer for certain tasks. Keep the following in mind when working with resident volunteers:

- Consider utilizing residents for basic tasks such as setup and cleaning.
- Be careful when recruiting volunteers and be aware of their background. Consult the sponsoring organization or the local EOC for background check requirements, if any, in the local area.
- You may also choose to seek volunteers from the shelter population as they are a readily available resource to fill certain staff positions.
- When recruiting volunteers from within the shelter, assign them to positions that do not compromise the privacy of other residents, such as registration that would allow access to private information.
- Volunteers can be used in positions where constant supervision is not necessary (e.g., feeding, cleaning, and maintenance).
- Only assign trained and experienced staff to work with children, elderly people with disabilities and others with access and functional needs.

**NOTE:** Use caution if assigning staff or resident volunteers under the age of 18. Written parental consent should be obtained, and direct supervision should always be provided.

**NOTE:** In Presidentially declared disasters, your local and state governments can utilize volunteer hours to offset the cost share of Public Assistance dollars awarded to the state through FEMA assistance programs.

Tracking volunteer hours not only helps you recognize the good work of your volunteers, but may translate into much needed cost savings for the community recovering from a disaster.
### Standard Short-Term Emergency Shelters

<table>
<thead>
<tr>
<th>Staffing Per Shift* (Based on 200 residents)</th>
<th>Manager</th>
<th># of Supervisors</th>
<th># of Workers</th>
<th>Scaling Factor Per Population</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Shelter Management</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1 for every 165 residents, minimum 1</td>
<td>Worker is administrative support person/staffing</td>
</tr>
<tr>
<td>Client Registration</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1 for every 100 residents, minimum 1</td>
<td></td>
</tr>
<tr>
<td>Dormitory</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1 for every 100 residents, minimum 1</td>
<td></td>
</tr>
<tr>
<td>Feeding</td>
<td>2</td>
<td>2</td>
<td>1</td>
<td>1 for every 110 residents, minimum 1</td>
<td></td>
</tr>
<tr>
<td>Health &amp; Mental Health Services</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td>1 for every 200 residents, minimum 1</td>
<td>Accredited professional</td>
</tr>
<tr>
<td>Logistics</td>
<td>1</td>
<td>2</td>
<td>1</td>
<td>1 for every 500 residents, minimum 1</td>
<td></td>
</tr>
</tbody>
</table>

*For total staffing numbers, multiply by the number of shifts with the exception of the shelter manager of which there is only one.

Staffing levels and scaling factors are guidelines. Staffing for each shelter is situational dependent. Additional staff may be necessary based on the demographics and needs of the shelter residents. Examples of additional staff might include security personnel, janitorial services and staff for children’s areas.
Table of Organization

Manager

Health/Mental Health

Supervisor

Staffing

Supervisor

Registration

Dormitory

Feeding

Logistics
**Possible Staffing Challenges**

**Staff Shortages**
Should you encounter staffing shortages, you may consider requesting staff from the local Emergency Operations Center. Request staff through the chain of command. Be specific regarding the type of staff needed as well as the skills required (e.g., Is there a need for dormitory staff or a dormitory supervisor?).

**Staff Overages**
Should your shelter have too many staff, advise the local EOC. There may be a shortage at another shelter and these staff could be re-assigned.

**Logistics**
Logistics is the process used for the acquisition and maintenance of the materials, equipment and services necessary for shelter operations.

**Identify Potential Resources**
Your shelter will need a variety of items. Identify potential resources for the following:

- Potable water
- Communications equipment
- Food and service supplies/equipment
- Sanitation supplies/equipment
- Children’s and infants’ supplies
- Universal/accessible cots
- Blankets
- Pillows
- Personal hygiene supplies
- Towels
- Durable medical equipment (e.g., wheel chair, oxygen concentrator)
- First-Aid and medical supplies
- Administrative supplies
- Tables and chairs
**Procurement**

Procure supplies and equipment using the following suggested options (local resources may vary):

- Local vendors and/or current suppliers
- Sponsoring organization
- Donations
- Local Emergency Operations Center (EOC). Communicate through shelter chain of command to request supplies.

**Safety and Security**

Providing for the safety and well-being of shelter residents is an important aspect of shelter operation.

**Assessing Shelter Security**

Assess and plan for shelter security needs—consider 24-hour a day, 7-days a week coverage, if necessary.

Consider the following factors when assessing and planning for security:

- The number of residents
- The number of potentially vulnerable residents such as:
  - Elderly
  - Individuals with disabilities
  - Children
- Consider the physical layout of the shelter facility and how this may affect shelter security (e.g., lighting or isolated rooms and areas).

Coordinate with your local Emergency Operations Center (EOC) about security needs.

- Communicate with law enforcement.
- Share the security plan with staff.
- Consider contracting security services as a last resort.

**Potential Security Issues**

It is important for the shelter management team to be realistic about the security risks that may exist in a large emergency shelter and to constantly monitor for signs of developing situations. It is vital to seek local law enforcement’s advice and technical support.
Monitor the following issues in the shelter:
- Sale or use of illegal drugs and alcohol
- Weapons
- Prostitution
- Gang activities
- Fights and altercations
- Theft of shelter or personal property
- Loud, boisterous and disruptive behavior
- Damage to shelter facilities
- Mistreatment or abuse of shelter residents including children

**Security Precautions**
Special security measures that may need to be instituted based on the situation include:
- Issuance of shelter identification (wrist bands, cards, etc.) to shelter residents and staff
- Identification checks at all doors
- Limiting the number of public entrances and exits
- Posting personnel to monitor the dormitory and children’s recreation area doors
- Package searches at doors
- Bathroom monitors
- Establishment of “off limits” areas
- Roving external patrols of the immediate area around the shelter (including parking areas)
- Relocation of problem residents (including arrest, when appropriate)

**Safety and Security Incident Documentation**
A key element of risk management is documentation of any type of incident that may result in follow-up action, whether that action might be litigation, cost-recovery or criminal investigation.

Specific examples of when to document a shelter incident include:
- Situations resulting in injury
- Situations where individuals are removed from the shelter or law enforcement personnel are requested
- Situations resulting in significant damage to the facility or loss of property
- Threats of harm or bodily injury made against any shelter resident or staff member
- Allegations of improper conduct

Copies of the incident report should be provided to:
- Organization managing the shelter
- Shelter manager’s personal records
Fire Safety

Your shelter should comply with local fire regulations. To ensure this:

- Request inspection assistance from local fire department.
- Inspect shelter for fire safety and consider the following factors:
  - Check general condition of sprinkler systems, if present.
  - Check for fire extinguishers. Note locations and share with staff.
  - Check emergency exits and ensure fire doors and exits are in good order and accessible.
  - Check for potential hazards (e.g., fire or electrical hazards).
- Develop fire evacuation plan and conduct fire drill, if needed.

Functional Needs Support Services

Shelters must address the needs of children and adults with disabilities, including those with accessibility and functional support needs so that all can be beneficiaries of programs, services and activities. Some children and/or adults with disabilities may be fully independent while others may require minimal to moderate assistance in the shelter. Respect the independence of all shelter residents and let people with disabilities make their own determination about what level of care and assistance they need.

Support services may include the following:

- **Communication** – People with communication needs may not be able to hear announcements, see signs, understand messages or verbalize their concerns.
- **Equipment and Personal Assistance** – Persons dependent on medical equipment or home health care will need to bring the equipment and/or the personal assistance they receive at home with them to the shelter. People can function independently as long as they have access to their assistive and supportive services or equipment. Examples of these are: durable medical equipment such as wheelchairs and walkers; medications; and, personal caregivers. If people do not bring their equipment, medications and/or personal assistant, these services must be provided. Call the local EOC if such equipment or services are needed.
- **Supervision** – People with supervision needs may include those who have psychiatric conditions (such as dementia, Alzheimer, depression) or mental illness.
- **Accessible Transportation** – Accessible transportation must be provided to children and adults who require it in order to benefit from the same programs and services offered others in and away from the shelter.
Specific considerations should be provided for the following populations, but are not intended to be all inclusive:

**People with Visual Disabilities**
- Consider the need to make printed information accessible (Braille, large print) and to provide a verbal orientation. Volunteers can help as sighted guides or readers.
- Cot Space – Locate sleeping space along a wall or in a corner to make it easier to find.

**People Who are Deaf or Hard of Hearing**
- For many persons who are deaf, sign language is the primary means of communication, and the shelter may want to find a sign language interpreter.
- Volunteers can help with basic communication needs – writing or slowly repeating instructions. Have note pads, pens and pencils available at the shelter for staff or volunteers to use. Keep language simple and draw pictures if necessary.

**People with Mobility Disabilities**
- Some individuals who use a wheelchair may need assistance transferring from their chair to a bed or cot, but can then proceed without assistance. Ask for advice on safe methods before lifting or moving the person.
- Meals – Ask if the person would like assistance when going through feeding lines.
- Cot Space – Assign a cot space in an area where access to eating areas and restrooms are available and not obstructed.
- Battery Charging – A person using a motorized wheelchair or scooter will need a place within the shelter to recharge their batteries.

**People with Developmental or Cognitive Disabilities**
- May have trouble processing information unless it is presented simply and slowly.
- Establish a buddy system with volunteers providing reassurance, calm explanation and attention to personal needs.
Service Animals

NOTE: The term “service animal” is defined in the Department of Justice, Americans with Disabilities Act (ADA) as any guide dog, signal dog or other animal individually trained to provide assistance to an individual with a disability including, but not limited to, guiding individuals with impaired vision, alerting individuals with impaired hearing to intruders or sounds, providing minimal protection or rescue work, pulling a wheelchair or fetching dropped items. Service animals are trained for tasks such as guiding people who are blind, alerting people who are deaf and/or providing emotional support. A person with a disability cannot be asked to remove his/her service animal from the premises unless:

- The animal is out of control and the animal’s owner does not take effective action to control it (e.g., a dog barking repeatedly).
- The animal poses a direct threat to the health or safety of others.

- Persons with service animals are entitled to keep this assistance with them at the shelter and any conveyance at all times. By law, service animals must remain with the person they serve; this includes accompanying an individual anywhere within a shelter.
- Consider segregating residents who have allergies to service animals.
Household Pets

- Shelter residents may have animal related allergies or phobias.
- There may be specific public health regulations or laws regarding housing of pets.
- Safety issues.

NOTE: The local government is typically responsible for emergency household pet sheltering if the owner is unable to do so. Household pets should be sheltered in distinct facilities designed to shelter animals.

Coordinate with the following organizations and agencies to determine appropriate sheltering for pets:
- Local EOC
- Local animal welfare organization (e.g. local SPCA, Humane Society)
- Local animal control agency
- Local animal shelter
- Local household pet boarding facilities
- Veterinarians
- Veterinary hospitals

NOTE: Service animals that accompany residents with disabilities are welcome in all public shelters (as required by law).
Opening A Shelter

Outlined below are the key tasks required for opening a shelter. The tasks are organized by function. Many tasks will be completed simultaneously.

Establish Schedules for Daily Activities

Establishing daily schedules and activities helps promote routine for shelter residents in an otherwise chaotic environment. Tools to assist with this include:

- Establish a bulletin board where messages, information and shelter rules and routines will be posted. Also share these verbally, in other languages and in alternate formats as needed by residents.
- Establish and post a shelter schedule in multiple places. Consider the following:
  - Showering schedule for sign-up
  - Meal times
  - Lights out
- Schedule a daily staff meeting
  - Updates on the shelter population
  - Updates of disaster operation, including any changes in staff assignments or responsibilities
  - Information about possible shelter visitors or handling media inquiries
  - Needs of shelter residents and staff
  - Any challenges or issues that need priority action
- Conduct a shelter resident meeting at the same time everyday to:
  - Communicate pertinent information in order to keep everyone adequately informed.
  - Address any issues they may have.
Registration

Ensure that all shelter occupants are greeted and register upon arrival. Complete, legible and accurate information about the residents is needed to track shelter populations and manage supporting their needs. Maintain a system for checking occupants in and out when they leave for any period of time. Function as the general shelter information desk.

NOTE: If an individual arrives at the shelter with apparent immediate health needs, refer immediately to health service staff, if available, or to appropriate authorities.

Registration Involves Three Primary Steps:

#1 Register Residents

Use one form, card or one sheet of paper for each household to record the following:
- Family name
- Total number of family members
- Pre-disaster address
- Phone numbers and email addresses
- Method of transportation
- Primary language and name of family member(s) who speak English
- Info on individual members:
  - Name
  - Age
  - Gender
  - Arrival date

Create a space on the registration form to record the date and relocation address for when residents depart.

Place completed registration information in a secure folder to ensure resident confidentiality.

Privately ask if anyone in the family must register with state or local authorities for any reason. Shelter manager or designee should discreetly discuss in confidence why the individual must register and contact local authorities, if necessary, for guidance.
#2 Conduct an Initial Health and Mental Health Screening
Conduct an initial health and mental health screening with each family member by asking the following questions:
- Ill or injured?
- Required medications?
- Dietary restrictions?
- Mobility or accessibility concerns or functional support requirements?
- Missing or deceased family member due to this disaster?

Refer individual to Physical and Mental Health personnel, if available, as appropriate.

#3 Identification of Unaccompanied Minors
Unaccompanied minors such as children separated from their parents may come to emergency shelters. When unaccompanied minors are identified in the registration process:
- Notify local law enforcement immediately.
- Designate a member of the shelter staff to accompany the minor until custody can be transferred to the appropriate authorities.

Registered Sex Offenders
Registered sex offenders may be a component of the dislocated population following a disaster. State and local laws vary regarding how sex offenders are required to identify themselves and where they will be housed following a disaster.

NOTE: Check with local law enforcement officials to determine what local statutes require concerning the sheltering of registered sex offenders.
Privacy and Information Sharing

All resident information should be stored in a secure area.

- Create protocols for storing and sharing resident information while maintaining confidentiality.
- Limit access to client information only to staff who need the information to perform their job functions.
- Only consider disclosing resident information if one of the following applies:
  - Resident has consented to disclosure in writing.
  - Valid subpoena, court order or warrant is presented.
  - To avert an imminent threat to the health or safety of the shelter residents or the community.
  - As required by law.

Dormitory Management

Dormitory management includes setting up and assigning sleeping areas, coordinating the provision of cots, pillows, blankets and personal hygiene supplies and maintaining a healthy and safe environment to rest.

- Allocate separate spaces for families, single women, single men and other special groupings.
- Distribute hygiene kits and other supplies (bedding, towels, etc.) if available.
- Ensure fire exits are not blocked in any way.
- Conduct a daily walk through to ensure:
  - Fire escape doors are operational.
  - Exit routes are clear and accessible.
  - Windows and doors are secure.
  - Floor is clear of trip hazards.
- Use dim lighting during sleeping hours.
- Continually monitor the dormitory area to ensure the safety of sleeping/resting residents, and to maintain a clean and quiet environment.

NOTE: When individuals and households are able to return to their pre-disaster living conditions, pre-disaster homeless will need to find alternative accommodations as well.
Health and Mental Health

Disasters may increase the risk of or exacerbate health and mental health conditions. Common health issues and possible solutions in shelters include:

- Communicable conditions, (e.g., flu, lice):
  - Provide areas of isolation for individuals with identified infectious conditions.
- Pre-existing health and mental health issues:
  - Arrange for screening and referral if required for pre-existing health and mental health conditions.
- Lack of medications and/or prescriptions:
  - Maintain current list of pharmacies near the shelter.
  - Ask pharmacies if they will support medication/prescription needs of the residents.
  - If access to a local pharmacy is not readily available, contact your local EOC for support and guidance.
- Restricted dietary requirements:
  - Arrange for the special dietary needs of people with restricted diets.
- Maternity:
  - Confirm maternity delivery plans (including location).

Common Mental Health Concerns in Shelters

Shelters can present greater challenges to some individuals. Some common mental health problems in shelters may include:

- Symptoms of anxiety, anger and depression:
  - Promote feelings of calm and hope by providing accurate information about the situation, listening, making connections to support systems and resources, providing realistic reassurance and promoting resilience and positive coping strategies (also referred to as psychological first aid).
- Pre-existing mental health issues such as substance abuse or addiction:
  - Ensure access to appropriate needed medications and support services are available.
Preventing Contagious Disease Outbreaks

Prevention is paramount in terms of keeping contagious diseases at bay. Be sure to remind both residents and staff to follow the basic tenets of personal hygiene.

Specific methods for preventing spread of contagious diseases include:

Personal Hygiene
Work with appropriate staff to develop a personal hygiene outreach plan designed to ensure the shelter population practices proper personal hygiene, such as:

- Covering coughs and sneezes.
- Wash hands often with soap and warm water and use hand sanitizer.
- Avoid touching eyes, nose or mouth. Germs spread this way.
- Try to avoid close contact with sick people.
- Keep areas clean, especially living areas.
- Promptly reporting illnesses or other medical concerns to shelter staff.

Food Preparation
Shelter staff who are working within the food preparation area must follow these practices:

- Use gloves in food preparation.
- Use fresh water for consumption and in food preparation.
- Separate raw and cooked foods.
- Cook thoroughly.
- Ensure food is kept within the temperature safety zone (above 140 or below 40 degrees).
- Follow proper hand washing procedures.
- Ensure food preparation and serving surfaces and equipment are washed using sanitizing procedures.

Should any sort of contagious disease outbreak occur, shelter staff should take the following precautions:

- Continue to promote personal hygiene measures.
- Report any outbreak to the local public health department and the local EOC.
- Request medical assistance as necessary.
- Ask residents who feel they may be affected to self-report to shelter staff.
- Working with medical personnel or other social service agencies, identify other residents who may be affected and speak with them privately.
- Increase the distance between people. When possible, place groups or families in individual rooms or in separate areas of the facilities. Place cots head-to-toe.
- Perform additional environmental cleaning.
NOTE: All areas where children play should be cleaned regularly and frequently. Give particular focus to items that are more likely to have frequent contact with the hands, mouths or body fluids of children (e.g., toys).

- Implement strategies to ensure infection prevention and control during food service. Cafeteria-style service is preferred over self-service, buffet-style or family-style.
- Pay special attention to the needs of children. Encourage parents and caregivers to monitor children for symptoms of illness and report immediately to shelter staff.
- Isolate staff, residents and their caregivers or family members if they are ill. If individual rooms are not available, designate a separate area.

Always:
- Coordinate with local health departments, hospitals, ambulance services, crisis counseling services and local mental health agencies to establish their capabilities and protocol for support.
- Have emergency phone numbers in an easily viewable location and make a phone available for staff and residents to call for help.
- Identify qualified staff that can administer First-Aid/ CPR and have a fully stocked first-aid kit available.

**Feeding**

Provide meals, snacks and water for residents and staff. Ensure that necessary resources for food service are available. Plan for and manage the preparation and service of meals and snacks.
- Keep accurate records of food and supplies received and used.
- Ensure safe food handling and sanitation practices are adhered to and be cautious of food that wasn’t commercially prepared. Contact local health department with questions.
- Consider inviting local health department to inspect shelter to ensure regulations are met and guidelines are followed.
- Maintain a 24-hour separate area with snacks (salty and sweet and healthy).
- Maintain fruits and beverages, such as water, coffee, tea and juice.
Logistics

Logistics provides a number of services for opening, running and closing a shelter. These include:

Site Maintenance and Custodial Services

Identify types of maintenance custodial services that may be needed such as:

- Janitorial and cleaning services - Determine if existing services can be increased to cover the greater need.
- Waste removal services.
- Grounds and parking lot cleaning.
- Maintenance and or repair of heating, ventilation and air-conditioning (HVAC), plumbing and electrical facilities if necessary.
- Extra cleaning and sanitation supplies.

Arrange and contract for services, if needed, using resources from the Local EOC or sponsoring agency.

Create a procedure for tracking all expenses and commitments for possible reimbursement. Ensure an organized, consolidated, easily-referenced system is in place that is secure. Check with local EOC for potential reimbursement opportunities and record requirements, such as:

- Documentation of all expenses
- Types of records to save:
  - Receipts
  - Invoices
  - Staff hours
  - Volunteer hours
  - Contracts
  - Memorandums Of Understandings
  - Incident reports
  - Daily activity and situation reports as requested by the local EOC or sponsoring organization

Establish and implement systems to track donated materials and services to ensure accountability and to support eventual formal recognition of the donors, such as:

- Donors’ point of contact (POC) information.
- Size, amount, location, type and date/time of donation.
Inventory Management
- Maintain inventory of all shelter supplies and equipment including donations.
- Identify and document equipment loaned or rented to the shelter.
- Track expenditures of all supplies and equipment.

Inventory Management Challenges
- Not enough supplies:
  - Maintain a count of supplies and document how quickly the shelter is using them.
  - Anticipate potential shortages and report what will be needed to the shelter manager or the local EOC.
- Supply overages:
  - Report any excess supplies to the local EOC. These supplies may be needed elsewhere.
  - Sometimes a shelter may receive items in bulk for planned distribution elsewhere. Contact the local EOC for guidance.

Monetary and Material Donations
Members of the community may offer both material and monetary donations directly at the shelter site. It is not advisable to accept unsolicited material donations on-site as this may divert staff, space and equipment needed elsewhere. This also may cause tension among residents as there may not be enough for everyone. It is also difficult to guarantee the quality of donated items.

Depending on the policies of the organization managing the shelter, it is normally not recommended that on-site staff accept monetary donations due to the accountability, tracking and appearance of accepting payment for services. Generally, shelter staff should be instructed to request that donors send their monetary donations through established systems for non-profit organizations.

Sometimes local or state jurisdictions will conduct donations operations and offers can be referred to these operations. Check with the local EOC for information.
Communications

Communication actions are integral for the successful opening of a shelter. A specific plan should be developed for each of the following distinct audiences and include alternate formats:

- Residents
- Shelter staff
- General public
- Media
- Local EOC
- Other officials

Residents

- Interact with shelter residents regularly. Answering questions, quelling rumors and restating shelter rules are important. This conveys a sense of routine and a transparency that will comfort residents.
- Conduct daily briefings to ensure that there is a timely and accurate flow of information to shelter residents to keep them informed about activities within the shelter and the overall disaster.
- Provide shelter residents with access to local news via a television, radio or newspaper.
- Provide information on recovery services, e.g., government agencies (including FEMA), American Red Cross, local community-based or faith-based relief and assistance programs.
- Ensure translators/interpreters are available to support information sharing at daily meetings and updates as needed.
- Maintain bulletin/message boards as a means for disseminating information to the shelter population and update postings throughout the day.

Shelter Staff

- Supervisors should check-in regularly with shelter staff.
- The shelter manager should conduct daily staff meetings to ensure information is shared among all staff and volunteers working in the shelter.
- Brief shelter staff on how to work with the media and how to handle media questions/interviews, e.g., speak only to the facts that you know.
- Remind staff on the procedures for handling donations of monetary and material goods.
Shelter Field Guide

OPENING A SHELTER

General Public

- Provide the following information:
  - Where to go for shelter.
  - What people seeking shelter need to bring with them.
- It may be necessary to communicate that people bring certain personal items with them to the shelter (e.g., blanket, towel, air mattress, pillow, washcloth, prescription medications, durable medical equipment, diapers, food and supplies for infants), since these items may not be immediately available at the shelter.
- It may be necessary to communicate what will not be permitted in the shelter.
- Consult with your local EOC prior to requesting resources from the community such as volunteers with specific skills.
- Contact local EOC for guidance if dignitaries, other officials and representatives of special interest groups visit the shelter.

Media

- Balance the media’s desire to publicize the disaster response with the privacy rights of the residents.
- Post signage requiring all media to check in through the registration desk.
- Notify the shift manager when media arrive and have a staff member accompany them to explain shelter operations and rules as well as answer questions.
- Monitor the following media related rules:
  - Do not disturb shelter residents during quiet hours or while they are resting by turning on bright lights or doing interviews in the dormitory area.
  - Do not take close-up photos or video of people’s faces without obtaining written permission.
  - Do not by-pass the registration check in area.
  - Display proper media identification at all times.
- Allocate a private area for media interviews away from general shelter population.
- Designate a shelter spokesperson at the facility to answer questions from the media. The spokesperson should answer only questions that pertain to that particular shelter. Shelter staff should direct all media inquiries to the spokesperson so that there is consistent messaging.
- Identify one or two residents willing to talk about their experience versus having the media randomly interview people in the shelter.
Local EOC

- Communicate regularly with the local EOC.
- Determine the information that must be reported to the EOC and how often.
- The following items are traditionally monitored/reported:
  - Number of overnight residents
  - Number of new registrations
  - Demographic information of shelter population
  - Feeding numbers (numbers of people served at each meal)
  - Supply inventories and projected requirements
  - Staff count (and anticipated staff shortages/overages)
  - Types of services available at the site, e.g., household pet care and feeding of non-residents
  - Any other issues to report, e.g., resource issues, communications problems, facility problems, security issues, shelter population problems
- Determine significant shortfalls of available and projected resources and communicate this to the EOC.
Ongoing Shelter Operations

Outlined below are the key tasks required for ongoing shelter operations.

Reporting

The purpose of reporting is to provide details on the shelter status and any issues that may be occurring. The shelter manager is responsible for communicating this information through the appropriate chain of command to the EOC and the sponsoring organization.

Shelter information should be provided in the correct form and reflect the appropriate reporting period. Additionally, the information should be provided according to the deadlines established by the EOC.

NOTE: The number of shelters, number of individuals being sheltered, and the number of meals served is often needed by State governments when requesting a Presidential disaster declaration and all the forms of assistance that come with this declaration.

Establish the Reporting Structure

Set up a reporting structure based upon the shelter’s chain of command. Reporting elements may be delegated to assigned staff to collect data for inclusion in the report for the EOC.

Create and Implement Reporting Tools

Create and implement the use of reporting tools that will allow the shelter manager to provide accurate information to the EOC.

- Situation Report – A situation report gives a quick overview of the shelter operations. It can contain situational information for a 24-hour period and aggregate information over the life of the shelter. This information can include:
  - Number of overnight residents
  - Number of meals/snacks served
  - Number of hygiene kits distributed
Shelter Field Guide

- Specific issues/resource needs
- **Shelter Population Count** – The shelter occupant count is taken after most residents have gone to bed (e.g., midnight). The resulting population is reported in the next morning’s report.

### Adjusting Operations to Changing Requirements
Shelter operations shift and change throughout the life of the shelter. Shelter management can be proactive in addressing these changes by considering the following information.

**Utilizing Shelter Resident Leadership**
The local community’s culture will influence the shelter environment. Seek out shelter leaders who have influence and can assist in identifying local cultural and other evolving shelter resident needs.

Occasionally factions within certain shelter populations can create a chaotic environment. Such factions can be addressed through identifying and working with shelter resident leadership who can assist in making difficult decisions on behalf of any of the factions involved.

By including the shelter population in the operation of the shelter, they not only assist in determining how the needs in the shelter are met, but also help to provide a more positive atmosphere for the residents.

**Competing Priorities**
While there are almost always limited resources and competing needs within a shelter, it is important that fairness and transparency be apparent in arriving at solutions. As an example, if there are not enough cots for all of the residents, priority should be given to the elderly, individuals with disabilities, children and adults with access and functional support needs and women who are pregnant. Then, work with shelter resident leadership who can assist in determining the allocation of the remaining cots.
Inadequate Shelter Space/Overcrowding

- Report overcrowding to the sponsoring organization or local EOC. Some clients may need to transfer to another shelter.
- Work with the shelter population to determine transportation planning as needed.
- Do not separate families.
- Determine if the facilities at the new shelter are fully accessible to help make decisions about shelter residents who have access and functional support needs.
- If there is inadequate space, work with the local EOC to make the determination to close the shelter to additional residents.
- Request referral information from the local EOC to identify the closest, available shelter(s).

Reunification Services

During disasters individuals and/or family members may become separated. Support is available for reuniting missing and displaced persons due to disasters. Here are some of the applications and services available.

- **National Emergency Family Register and Locator System (NEFRLS)** – The system facilitates communication between family members and friends during and after a disaster by storing primary family member’s contact information and personal messages from people who are affected by disasters and want to reunite with family and friends.
  The web address is: https://asd.fema.gov/inter/nefrls/home.htm
- **Safe and Well** – The American Red Cross can help people throughout the country find family members or friends through use of Safe and Well, a web-based system. People displaced by disaster log in and provide basic information on their status; their friends and family can log in and search for them.
  The web address is www.SafeAndWell.org.
- **The National Emergency Child Locator Center (NECLC)**, a part of the National Center for Missing and Exploited Children (NCMEC), is available during disasters and offers the following services:
  - Toll-free hotline that receives reports of displaced children.
  - Website that provides information about displaced children.
  - Deploys staff to the location of a declared disaster event to gather information about displaced children.
  - Provides information to the public about additional resources.
  - Partners with Federal, State, and local law enforcement agencies.
  - Refers reports of displaced adults to the Attorney General’s designated authority and the National Emergency Family Registry and Locator System.
Transportation

Transportation support may be required to bring residents to the shelter, to transport them for services while staying at the shelter and for their return home.

- Residents may request assistance with transportation to and from medical providers, post offices, banks, shops, schools and other essential trips.
- Work with the local EOC, local transportation providers or community organizations to arrange shuttle service for shelter residents to link them to public transportation systems or provide door to door services, as needed and if available.
- Accessible transit vehicles will be needed for persons using wheelchairs and other persons with disabilities affecting mobility.
Transition for Closing

The shelter management team needs to identify people who may have been homeless prior to the disaster and work with local social services, homeless service providers and community groups to search for housing support options for these individuals as soon as possible before the shelter closing process begins.

Close communication and coordination with the local EOC will ensure a successful transition to closing of the shelter.
Closing the Shelter

As residents are able to move back into homes, the shelter population will begin to dwindle. There will need to be a plan for closing the shelter. Some residents may not be able to move back into their homes and may need to seek assistance in finding alternative housing.

Shelter Closing Considerations

Before closing a shelter, several important items should be considered:

- Determine with the sponsoring organization or the local EOC how to meet the needs of the remaining shelter residents.
- Determine with the local EOC if there is a plan for combining multiple shelters to minimize the number of open shelters.
- Determine if other housing options are available for shelter residents.
- Assess facility availability and commitments, e.g., upcoming scheduled events or service.
- Review terms of facility shelter agreement or lease.
- Assess the availability of resources needed to keep the shelter open including staff, equipment and supplies.

NOTE: If a number of residents do not have a place to return to after the danger has passed, it may be too soon to close the shelter.
Shelter Closing Coordination

- Coordinate shelter closing with local EOC.
  - Update and share shelter population data including number of residents, number of households and number who do not have a place to go.
  - Share closing plan.
  - Coordinate public messaging.
- Identify case workers to visit shelters to transition residents out of the shelter.
- Communicate plan for closing.
  - Share clear, concise, advanced and timely notice of confirmed shelter closing date with residents, staff and community. Early notification of shelter closing will mitigate potential negative reaction due to disruption in routine and predictability.
  - Establish and notify residents and staff of last meal period.
  - Communicate closing plan to staff.
  - Inform residents of pre-arranged services such as transportation, household pet reunification arrangements and other available resources and referrals.

Closing Schedule

Develop and implement a closing schedule to include the following:

- Staff schedule for closing that may include debriefing and acknowledgement.
- Cleaning and return of loaned or rental equipment.
- Disposal and/or donation of excess expendable material/supplies.
- Removal of internal and external signage.
- Cleaning and repair of site.
- Inspection and completion of site release documentation. Resolve any discrepancies through agreements to make repairs to damage, etc.
- Processing of invoices and other reimbursement documentation.
- Facility released to owner.
Document Retention

Retain documents in a safe and secure environment. Documentation may include:

- Logs and reports
- Incident reports
- Agreements and/or contracts
- Invoices
- Shelter registration forms
- Volunteer and staff records
- Time record retention (when reimbursement is anticipated)
Successful shelter operations rely on the coordinated performance of 7 separate functions. Including:

- **Shelter Management**: Provide administrative support and supervision for all functions in the shelter. Ensure that the occupants’ needs are being met.
- **Registration**: Ensure that all shelter occupants are greeted and registered upon arrival. Maintain system for checking occupants in and out when they leave for any period of time. Manage the system of record keeping for shelter registrations.
- **Feeding**: Supervise the food preparation and service in the shelter. Ensure that the needed supplies for the food service are available. Keep accurate records of food and supplies received and expended.
- **Dormitory Management**: Set up sleeping areas. Ensure that residents have assigned areas for sleeping. If applicable, coordinate placement of cots and blankets in area. Monitors the dormitory area to maintain a safe and quiet area to sleep/rest.
- **Staff Recruitment**: Recruit, place and support staff assigned to the shelter. Provide opportunities to shelter residents to serve as volunteers in the shelter. Maintain records of all workers that assist with shelter operation (including name, address and phone number).
- **Logistics**: Provide support for the use of the facility. Ensure the safety, security and sanitation for the shelter. Procure, store and distribute supplies and equipment at the shelter.
- **Health and Mental Health**: Provide quality health services and ensure public health standards are met.
Using the Checklists

A checklist has been developed for each of the functions listed on the previous page. The checklists can be used as:

- Training tools. (See the “Coaching Materials” section for more information on training using checklists.)
- Ongoing checklists for each function.

NOTE: Consider making copies of each Checklist to provide to staff members during their shifts or post Checklists in functional areas as reminders for staff.
Shelter Field Guide

Shelter Manager Checklist

Provide administrative support and supervision for all functions in the shelter. Ensure that the residents’ needs are being met.

Opening

- Determine scope of shelter services.
- Survey and layout the space plan for the shelter.
- Complete site review.
- Brief and organize staff.
  - Ensure staff understands procedures for handling household pets, support for people who requiring access or functional support, service animals and other key issues.
- Assign staff to the following positions and initial tasks:
  - Logistics: Put up shelter identification (outside and inside as appropriate).
  - Health Services: Set up the health services area and determine immediate supply requirements and prepare to do health screening for incoming shelter residents.
  - Staffing: Ensure that all shelter staff is: registered, properly identified and evaluate staffing needs for the next 48-72 hours.
  - Registration: Set up Registration area, including Health and Mental Health areas.
  - Feeding: Prepare/set out snacks and beverages in designated area and determine when and how first meal will be served.
  - Dormitory/Logistics: Set up sleeping area. Post internal signage to include shelter guidelines.
- Call your sponsoring organization, agency or local EOC to discuss:
  - Financial authority limits.
  - Process for ordering resources.
  - Shelter activity reporting requirements.
  - Location of food supplies (vendor information, etc.).
  - Phone numbers (and e-mail address) to contact the EOC shelter supervisor and the points of contact with your sponsoring organization or agency.
  - Security coverage, if necessary.
  - Anticipated shelter population.
- Develop a staffing plan for the next 48-72 hours.
Shelter Manager Checklist — Continued

☐ Coordinate recruitment of additional personnel. Encourage involvement of shelter residents.
☐ Order any needed start-up supplies.
☐ Meet with Feeding staff to discuss feeding options.
☐ Establish a shelter log reporting system.

Ongoing

☐ Conduct shift change briefing with the shift supervisor to share issues from the previous shift.
☐ Maintain regular (at least daily) communications with your sponsoring organization or agency or the EOC:
  ☐ Provide daily shelter activity report information.
  ☐ Discuss problems and support needs.
  ☐ Relay plans for shelter’s immediate future.
  ☐ Status of over-all disaster response, including any potential issues or secondary hazards that might impact shelter operations.
☐ Evaluate security requirements and place support requests.
☐ Hold regularly scheduled meetings with shelter residents:
  ☐ Communicate pertinent information.
  ☐ Provide rumor control.
☐ Greet and work with media (in the absence of Public Information staff):
  ☐ Obtain resident permission for media involvement.
☐ Hold regularly scheduled meetings with shelter staff.
☐ Oversee shift assignments for shelter staff as needed.
☐ Monitor shelter operations by regularly walking through the facility including these areas:
  ☐ Registration area
  ☐ Food preparation and serving areas
  ☐ Dormitory area
  ☐ Other areas of facility including restrooms and exterior
☐ Ensure resident needs and health standards are being met.
☐ Meet regularly with facility representative to share concerns and address potential problems.
Shelter Manager Checklist — Continued

- Update all contact information regularly:
  - Sponsoring organization or agency POC
  - EOC
  - Shelter staff
  - Health services contacts

Closing

- Discuss plans for closing the shelter with your sponsoring organization or agency and the local EOC.
- Discuss closing plans with shelter staff. Identify:
  - Immediate needs of each family and resources that may be able to assist.
  - Individual family relocations, if needed.
- Discuss closing plans with shelter residents. Provide:
  - Adequate notice of closing
  - Referrals, if needed
  - Relocation to another shelter, if appropriate
- Identify borrowed, misplaced or broken equipment.
- Clean facility thoroughly.
- Remove shelter signage.
- Submit all paperwork to your sponsoring agency for retention, including:
  - Shelter Registration Forms
  - Shelter staff contact information, evaluations, etc.
  - Purchasing records
  - Copies of activity logs, invoices and reports
  - Shelter incident reports
  - Contracts
Registration Checklist

The registration supervisor and workers are responsible for ensuring that persons entering and leaving the shelter go through the registration process. Complete, legible, and accurate information about the residents of the shelter is needed.

Opening

☐ Set up registration table near entrance. Welcome those entering and answer any questions.
☐ Provide enough registration tables to handle the number of residents within a reasonable period of time.
☐ Post registration signage at the registration area.
☐ Be prepared for large crowds.
  ☐ Use only one entrance, if possible.
  ☐ Position shelter staff at other entrances to direct residents.
  ☐ DO NOT BLOCK fire exits.
☐ Use a registration form, index cards or a pad of paper to record information about families entering the shelter. (See the Shelter Field Guide—Tools and Resources for an example.)
  ☐ Use only one form, card or piece of paper per family. This allows for confidentiality and assists with record maintenance.
☐ Provide a Shelter Information Sheet to each family who registers. (See the Shelter Field Guide—Tools and Resources for an example.)
☐ Refer these individuals to a Health Service staff member:
  ☐ Ill or injured person
  ☐ Any individuals on special medications
  ☐ Any individuals with special diets
  ☐ Any individuals who claim to have formal medical training
  ☐ People who require/request functional support or who may be medically fragile (e.g., mother with a new born infant or someone just released from the hospital)

**NOTE:** It is recommended that a Health Services staff member work at the registration table.

☐ Remind shelter residents they are expected to “sign out” at the registration desk upon final departure.
Registration Checklist – Continued

**Ongoing**

- Sign in new incoming shelter residents, track and provide new registration information to the Shelter Manager.
- Place signs at all exits to remind those leaving the shelter to go to the registration desk when checking out of the shelter.
- Provide general shelter resident information.
- Sign in and escort official visitors, including the media, to the shelter manager.

**Closing**

- Ensure that shelter registration forms are forwarded to the appropriate location, as instructed by the shelter manager.

Feeding Checklist

The Feeding staff advises Logistics and the Shelter Manager of what food and supplies are needed; monitors the preparation and serving of food; keeps accurate records of meals served, food and supplies received and expended; and if requested, records the hours of food preparation and serving staff.

**Opening**

- Discuss the following with your Shelter Manager:
  - Meal schedules
  - Menus
  - Procedures for obtaining food and supplies
  - Whether food will be prepared on-site or catered
- Establish a beverage and snack canteen as soon as possible.
- Determine when the first meal will be needed.
- Inventory the facility’s food and feeding support supplies such as paper towels, plastic and paper utensils, coffee.
- Ensure all staff is briefed on safe food handling procedures and they are provided with required gloves and hair nets.
Feeding Checklist – *Continued*

- Plan menus based on these considerations:
  - Availability of food
  - Convenience of procurement and preparation
  - Cultural concerns
  - Dietary restrictions of shelter residents
  - Cost and quality

- Locate dining area near the serving area.
  - Set up tables and chairs.
  - Arrange tables and chairs to accommodate the maximum number of people expected to be served at one time.
  - Post signs communicating information such as meal times, clean up requests and food restrictions in the dormitory area.

- Evaluate staffing needs:
  - Plan staffing levels to accommodate a timely, efficient meal service.
  - Speak with the Shelter Manager if more feeding/food preparation or serving staff is required.

- Consider the following food service staffing:
  - Kitchen and logistics supervisor
  - Cook and helpers
  - Food service workers
  - Dish washers
  - Clean-up crew

- Review local health codes and/or contact local health department for assistance and guidance.

**NOTE:** Keep the list of the facility’s initial inventory so that the inventory can be re-stocked prior to shelter closing.

---

**Ongoing**

- Establish a work schedule and assign shifts as necessary.
- Ensure staff are assigned to and briefed on their specific duties.
- Keep menus simple.
- Ensure there is enough food for everyone and that food is not wasted.
- Monitor food temperatures and safe food handling procedures.
- Ensure all food is eaten in the food service area and is not taken into other areas of the facility (particularly the dormitory area).
- Be open to comments and suggestions from the shelter residents.
- Serve food appropriate for the weather (i.e. cold food when the weather is hot, hot food when the weather is cold).
**Feeding Checklist – Continued**

- Keep records:
  - Maintain lists of all inventory obtained.
  - Keep receipts of all expenses incurred.
  - Record any breakage of the facility’s equipment for replacement at closing.
- Ensure that food areas are kept clean and sanitary.
- Monitor usage levels to adjust orders and inventory levels as the shelter feeding requirements change.
- Keep the shelter manager informed of the status of your food operation. Report any problems or needs.

**Closing**

- Determine when the last meal will be served.
- Discuss the disposition of excess food and supplies with the Shelter Manager.
- Ensure the kitchen and food service area is clean and restored to its pre-disaster condition.
Dormitory Checklist

Dormitory staff is responsible for setting up and assigning sleeping areas within the dormitory. Additionally, dormitory managers coordinate with Logistics or the Shelter Manager for cots, blankets and hygiene kits. Staff will also monitor the dormitory area to maintain a safe and quiet environment for residents to sleep and rest.

**Opening**
- Designate space within the dormitory area. Allocate separate spaces for:
  - Families
  - Single women
  - Single men
  - Other special groupings
- Consider items unique to the event. For example, in hurricanes the shelter may have to accommodate greater numbers of people initially. Residents may be placed into confined areas with less than 20 square feet per person until the storm is over.
- Ensure the building is ADA compliant, allowing access and movement through the building to all individuals.
- Work with Logistics or the Shelter Manager to procure blankets and cots, pillows, towels and hygiene items.
- Set up cots and distribute blankets, pillows, towels and hygiene items.

**NOTE:** It is recommended that 40 square feet of space be allocated per resident in the dormitory area.

**Ongoing**
- Communicate to residents that personal items are the responsibility of the resident.
- Post shelter rules in appropriate languages within the dormitory and monitor the dormitory to ensure shelter rules are being followed.
- Post the “lights out” and “quiet hours” schedule within the dormitory.
- Arrange for dim lighting during sleeping times.
- Coordinate with security personnel to ensure that shelter personnel circulate throughout the shelter during quiet hours.
- Control all equipment using standard inventory techniques.
- Communicate that shelter occupants are expected to help keep the dormitory area clean.
- Coordinate with Health staff to monitor shelter residents for potential health issues.
**Dormitory Checklist – Continued**

**NOTE:** It may be useful to have families sign for the number of cots and blankets they have been issued.

- **Closing**
  - Determine disposition of all dormitory equipment in conjunction with Shelter Manager.
  - Take down and clean equipment (cots, blankets, etc.) as required.
  - Return equipment as requested by the Shelter Manager.
  - Clean the dormitory area, returning it to a pre-disaster condition.
  - Remove all shelter signage.

- **Staffing Checklist**

  To ensure proper staffing levels, it is important to anticipate the work load and staff availability. Individuals assigned to ensure proper staffing levels will coordinate with the shelter manager and supervisors to recruit, train, assign and release employees and volunteers.

- **Opening**
  - Consult with the Shelter Manager and other supervisors to determine each function in the shelter. List:
    - Tasks to be performed and expectations
    - Skills needed
    - Hours required daily
  - Prepare a daily schedule for each function that includes the:
    - List of tasks to be performed
    - Number of staff needed
    - Schedule of times for tasks to be performed
  - Post daily staff sign in sheets to log individual work times.
  - Secure a staffing work space that:
    - Is easily accessible to staff
    - Can be used as a sign-in, interviewing and orientation area

  **NOTE:** It may be useful to have families sign for the number of cots and blankets they have been issued.
Ongoing
- Survey the existing shelter population for possible staff. Look for people with the type of skills and abilities needed to fill various shelter positions.
- Keep a daily record of all shelter volunteers.
  - Maintain the volunteer’s name, address and phone number.
  - Note if the volunteer was also a shelter resident.
  - Maintain a log of the volunteer’s date/hours worked.
- Ask the shelter manager what statistics will be needed for the daily report. Track and provide this information consistently.

Closing
- Provide all records needed for retention.
- Ensure volunteers receive recognition by submitting their contact information to the appropriate location.

Logistics Checklist

Logistics personnel have a variety of important tasks to perform to ensure proper shelter operations. These tasks include supporting the use of the facility; ensuring the safety, security and sanitation for the shelter; and procuring, tracking, storing and distributing supplies and equipment at the shelter.

Opening
- Conduct a quick inspection of the facility. Note the:
  - General condition of the areas to be used.
  - Potential hazard areas.
- Inventory and establish security for the facility’s supplies and equipment.
- Prepare the facility for operations.
- Place signage inside and outside the building.
- Support the equipment/furniture placement in the following areas:
  - Waiting area
  - Registration
  - Health and Mental Health Services
  - Dormitory
  - Food serving area
  - Children/family area
  - Lounge/recreation area
  - Staff area
  - Shelter Manager’s Office
  - Supply storage
Logistics Checklist – Continued

☐ Discuss with the Shelter Manager:
  ☐ Building security
  ☐ ADA compliance
  ☐ Financial authority
  ☐ Process for requesting needed items
  ☐ Shower/bathing facilities, if applicable
  ☐ Extra restrooms/toilet facilities, if needed

Ongoing

☐ Conduct routine rounds of the facility including:
  ☐ Perimeter walks
  ☐ Interior walks

☐ Conduct safety inspections:
  ☐ Kitchens
  ☐ Storage areas
  ☐ Food staging areas
  ☐ Dining areas
  ☐ Restrooms
  ☐ Entrances and exits
  ☐ Dormitory areas
  ☐ Health and Mental Health Service areas

☐ Coordinate with other functions on supply needs.
☐ Take steps to resolve any facility or supply problems.
☐ Consult with the food preparation supervisor about food sanitation arrangements.
☐ Discuss waste removal and pick-up arrangements with your sponsoring organization or agency.
☐ Order supplies necessary to ensure proper sanitation and personal hygiene.
☐ Keep records of expenses.

Closing

☐ Return all borrowed or rented equipment to owners.
  ☐ Submit a list of returned items to your Shelter Manager.
☐ Return the facility to its pre-disaster condition.
  ☐ Clean the facility.
  ☐ Remove signage inside and outside.
  ☐ Note any shelter related damage and arrange for repair.
☐ Conduct a final inspection of the building
  ☐ Discuss any additional follow-up needed with your sponsoring organization or agency.
Health and Mental Health Checklist

When possible, health and mental health services should be made available to ensure that shelter residents’ basic health needs and applicable public health standards are met. This is often achieved by referring residents to the appropriate medical providers.

Opening
☐ Obtain contact information from your sponsoring organization or and discuss potential Health and Mental Health needs and resources for the shelter.
☐ Conduct an initial health and mental health screening with each family member and make appropriate referral if necessary.

Ongoing
☐ Arrange to meet the anticipated needs of all shelter residents, including:
  ☐ Infants
  ☐ Elderly
  ☐ Occupants with functional needs
☐ Discuss needed medical coverage with your sponsoring organization or agency.
☐ Determine special diets needed and discuss these with your Shelter or Feeding Manager.
☐ Note individuals with communicable diseases (e.g., flu, lice) and discuss appropriate interventions with your sponsoring organization or agency.
☐ Note individuals with preexisting health challenges.
☐ Discuss shelter facility health inspections with your sponsoring organization or agency.
☐ Monitor individuals on medications and provide secure storage for these medications.
☐ Discuss shelter facility health inspections with your sponsoring organization or agency.
☐ Arrange for 24-hour medical consultation by getting a recommendation from your sponsoring organization or agency, or the local EOC.
☐ Ensure health/medical records are properly documented and securely maintained.
Health and Mental Health Checklist—Continued

Closing
☐ Transfer health/medical records as directed by your sponsoring organization or agency.
☐ Return supplies and equipment.

NOTE: Always:
• Coordinate with local health departments, hospitals, ambulance services, crisis counseling services and local mental health agencies to establish their capabilities and protocol for support.
• Have emergency phone numbers in an easily viewable location and make a phone available for staff and residents to call for help.
• Identify qualified staff that can administer First-Aid/CPR and have a fully stocked first-aid kit available.
The following coaching aids are provided to assist Shelter Managers and their designees in quickly training shelter staff.

**Preparation to Train**
- Gather needed materials:
  - Shelter Field Guide
  - Copy of position checklist
  - Copy of position coaching aid
  - Examples of forms (contact your sponsoring agency for any specific registration forms to be used in your shelter).
- Review the sections specified in the coaching aid.
- Review the position checklist.
- Pre-identify items you want to demonstrate for the trainee and the materials that will be needed.
- **Self-Study** – Have trainee review those areas of the Shelter Field guide identified on the coaching aid.
- **Discuss** – Use the Discussion Points on the coaching aid to discuss position-relevant information with the trainee.
- **Demonstrate** – Demonstrate the tasks you wish the trainee to complete.
- **Observe** – Observe the trainee completing tasks. Provide guidance and assistance if needed.
- **Reinforce** – Reinforce the training concepts by answering any questions the trainee may have.
Shelter Field Guide

Shelter Management Coaching Aid

Self Study
- Have trainee review the following sections of the Shelter Field Guide:
  - Introduction
  - Before Opening a Shelter
  - Opening a Shelter
  - Ongoing Shelter Operations
  - Transition for Closing
  - Closing the Shelter
  - Checklists

Discussion Points
Discuss the following items with the trainee and answer any questions the trainee may have.

Before Opening A Shelter
- The fundamental objectives of shelter operations. (pg. 2)
- The first four steps in opening a shelter. (pg. 5-6)
- Items to consider when determining the shelter layout. (pg. 7-11)
- Shelter rules (pg. 12)
- Staffing recommendations (pg. 12-18)
  - Discuss use of resident volunteers to augment shelter staff.
  - Discuss handling staffing overages/shortages.
  - Discuss staffing template.
- Material resources/logistics (pg. 18)
- Safety and security (pg. 19-21)
- Functional needs support services (pg. 22)
  - Discuss how functional needs will be met.
  - Discuss policy/procedure regarding service animals and household pets.

Opening A Shelter
- Schedule of daily activities (pg. 26)
- Registration process (pg. 27)
- Policy/procedure for unaccompanied minors (pg. 28)
- Policy/procedure for registered sex offenders (pg. 28)
- Policy/procedure for privacy and information sharing (pg. 29)
Shelter Management Coaching Aid – continued

- Daily management of registration; dormitory management; health and mental health services; food services; logistics (pg. 27-35)
- Policy/procedure for monetary and material donations (pg. 35)
- Communications (pg. 36-38)

Ongoing Shelter Operations
- Reporting structure and tools (pg. 39-40)
- Reunification services (pg. 41-42)
- Transportation (pg. 42)

Transition for Closing
- Discuss triggers that could signal it is time to close the shelter. (pg. 43)

Closing the Shelter
- Shelter closing considerations (pg. 44)
- Document retention (pg. 46)

Demonstrate
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for the shelter manager could include:
  - Preparing a daily activity schedule
  - Preparing a staffing checklist
  - Reviewing expenditures
  - Reporting shelter numbers
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Shelter Management Checklist with the trainee. Provide copies for the trainee to use.

Observe
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

Reinforce
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs policy and decision-making within the shelter.
Registration Coaching Aid

Self Study
Have the trainee review the following sections of the Shelter Field Guide:
- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Establish Shelter Rules (pg. 12)
  - Security Precautions (pg. 20)
  - Service Animals (pg. 24)
  - Household Pets (pg. 25)
- Opening a Shelter
  - Registration (pg. 27-29)
  - Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - Document Retention (pg. 46)
- Checklists
  - Registration Checklist (pg. 52-53)

Discussion Points
Discuss the following items with the trainee and answer any questions the trainee may have.

Before Opening A Shelter
- Shelter rules pertaining to registering upon entering the facility
- Security issues at registration

Opening A Shelter
- Policy/procedure for:
  - Service animals and household pets
  - Unaccompanied minors
  - Registered sex offenders
  - Privacy and information sharing
  - Monetary and material donations
- Communications

Ongoing Shelter Operations
- Required reporting
- Shelter ingress and egress policies

Transition for Closing
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from registration in order to make a shelter closing determination.
Registration Coaching Aid – Continued

Closing the Shelter
- Returning registration materials
- Returning the area to its previous condition
- Document retention

Demonstrate
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for registration could include:
  - Completing a registration form
  - Storing the registration form in a safe place
  - Developing a shelter population report
  - Handling sensitive situations such as unaccompanied minor, registered sex offender
  - Handling service animals
  - Handling household pets
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Registration Checklist with the trainee. Provide copies for the trainee to use.

Observe
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

Reinforce
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs registration policy within the shelter.
**Feeding Coaching Aid**

### Self Study
Have the trainee review the following sections of the Shelter Field Guide:

- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Determine the Scope of Shelter Services Needed (pg. 6)
  - Meal Preparation and Serving Areas (pg. 8-9)
  - Establish Shelter Rules (pg. 12)
- Opening a Shelter
  - Establish Schedules for Daily Activity (pg. 26)
  - Feeding (pg. 33)
  - Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - Document Retention (pg. 46)
- Checklists
  - Feeding (pg. 54-56)

### Discussion Points
Discuss the following items with the trainee and answer any questions the trainee may have.

#### Before Opening A Shelter
- Meal schedules
- Special dietary needs
- Cultural preferences
- Food service staff

#### Opening A Shelter
- Daily activity schedule
- Food and supply inventory
- Food and supply ordering

#### Ongoing Shelter Operations
- Required reporting
- Food service rules for residents

#### Transition for Closing
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from food service in order to make a shelter closing determination.
Feeding Coaching Aid – Continued

Closing the Shelter
- Returning food service supplies and equipment
- Determining disposition of food stuffs
- Returning the area to its previous condition
- Document retention

Demonstrate
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for food service could include:
  - Menu preparation
  - Meal preparation
  - Meal service
  - Inventory
  - Ordering
  - Equipment maintenance
  - Record keeping
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Feeding Checklist with the trainee. Provide copies for the trainee to use.

Observe
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

Reinforce
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs food preparation and food service policy.
**Dormitory Coaching Aid**

**Self Study**
Have the trainee review the following sections of the Shelter Field Guide:
- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Site Layout and Set-Up (pg. 6-11)
  - Establish Shelter Rules (pg. 12)
  - Safety and Security (pg. 19-21)
  - Functional Needs Support Services (pg. 22-24)
- Opening a Shelter
  - Establish Schedules for Daily Activity (pg. 26)
  - Dormitory Management (pg. 29-30)
  - Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - DocumentRetention (pg. 46)
- Checklists
  - Food Preparation Checklist (pg. 54-56)

**Discussion Points**
Discuss the following items with the trainee and answer any questions the trainee may have.

**Before Opening A Shelter**
- Setting up the dormitory
- Dormitory rules
- Personal hygiene/comfort items
- Dormitory staff

**Opening A Shelter**
- Daily activity schedule
- ADA compliance
- Assigning space within the dormitory

**Ongoing Shelter Operations**
- Dormitory rules
- Dormitory security
- Required reporting
Dormitory Coaching Aid – Continued

Transition for Closing
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from the dormitory in order to make a shelter closing determination.

Closing the Shelter
- Returning supplies and equipment
- Returning the area to its previous condition
- Document retention

Demonstrate
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for the dormitory could include:
  - Setting up cots
  - Inventory management
  - Maintaining a clean dormitory
  - Equipment maintenance
  - Record keeping
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Dormitory Checklist with the trainee. Provide copies for the trainee to use.

Observe
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

Reinforce
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs dormitory management policy.
**Staff Recruitment Coaching Aid**

**Self Study**
Have the trainee review the following sections of the Shelter Field Guide:
- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Establish Shelter Rules (pg. 12)
  - Staffing (pg. 12-17)
  - Possible Staffing Challenges (pg. 18)
  - Shelter Team Table of Organization (pg. 17)
  - Safety and Security (pg. 19-21)
- Opening a Shelter
  - Establish Schedules for Daily Activity (pg. 26)
- Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - Document Retention (pg. 46)
- Checklists
  - Staffing Checklist (pg. 59)

**Discussion Points**
Discuss the following items with the trainee and answer any questions the trainee may have.

**Before Opening A Shelter**
- Staffing requirements
- Recruitment possibilities
- Shelter policies and procedures

**Opening A Shelter**
- Daily activity schedule
- Staff schedule for each function
- Recruitment

**Ongoing Shelter Operations**
- Maintaining the staff schedule
- Maintaining log of volunteer hours worked
- Addressing staff issues
- Reporting
**Staff Recruitment Coaching Aid – Continued**

**Transition for Closing**
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from staffing in order to make a shelter closing determination.

**Closing the Shelter**
- Returning supplies and equipment
- Returning the area to its previous condition
- Document retention
- Ensure volunteers receive recognition for their work at the shelter

**Demonstrate**
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for staffing could include:
  - Staff and Volunteer orientation
  - Staff documentation and records
  - Volunteer hours worked
  - Disciplinary actions
  - Incident reporting
  - Recruitment
  - Scheduling
  - Other Record Keeping
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Staffing Checklist with the trainee. Provide copies for the trainee to use.

**Observe**
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

**Reinforce**
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs staffing policy.
Logistics Coaching Aid

Self Study
Have the trainee review the following sections of the Shelter Field Guide:
- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Complete a Site Review (pg. 4-6)
  - Site Layout and Set-Up (pg. 7-10)
  - Sample Shelter Floor Plan (pg. 11)
  - Logistics (pg. 18)
  - Safety and Security (pg. 19-21)
  - Fire Safety (pg. 21)
- Opening a Shelter
  - Establish Schedules for Daily Activity (pg. 26)
  - Logistics (pg. 33-35)
  - Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - Closing Schedule (pg. 45)
  - Document Retention (pg. 46)
- Checklists
  - Logistics Checklist (pg. 60-61)

Discussion Points
Discuss the following items with the trainee and answer any questions the trainee may have.

Before Opening A Shelter
- Conducting a site review
- Site layout and set-up
- Initial Inventory
- Shelter policies and procedures

Opening A Shelter
- Daily activity schedule
- Facilities maintenance
- Inventory control
- Procurement
- Financial authorities
## Logistics Coaching Aid – *Continued*

### Ongoing Shelter Operations
- Inventory control
- Ongoing procurement
- Ongoing financial authorities
- Facilities maintenance
- Safety and security

### Transition for Closing
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from logistics in order to make a shelter closing determination.

### Closing the Shelter
- Returning supplies and equipment
- Returning the area to its previous condition
- Document retention

### Demonstrate
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for logistics could include:
  - Inventory control
  - Procurement
  - Facilities maintenance
  - Safety and security
  - Other Record Keeping
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Logistics Checklist with the trainee. Provide copies for the trainee to use.

### Observe
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.
Logistics Coaching Aid – *Continued*

**Reinforce**

- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs logistics policy.
Health and Mental Health Services Coaching Aid

Self Study
Have the trainee review the following sections of the Shelter Field Guide:
- Introduction (pg. 1-4)
- Before Opening a Shelter
  - Site Layout and Set-Up (pg. 7-11)
  - Establish Shelter Rules (pg. 12)
  - Safety and Security (pg. 19-21)
  - Functional Needs Support Services (pg. 22-24)
- Opening a Shelter
  - Establish Schedules for Daily Activity (pg. 26)
  - Health and Mental Health (pg. 30-33)
  - Monetary and Material Donations (pg. 35)
- Closing the Shelter
  - Document Retention (pg. 46)
- Checklists
  - Health and Mental Health Services Checklist (pg. 62-63)

Discussion Points
Discuss the following items with the trainee and answer any questions the trainee may have.

Before Opening A Shelter
- Shelter policies and procedures

Opening A Shelter
- Health and mental health policies
- Supporting agency and medical support contact information
- Assessing the shelter population

Ongoing Shelter Operations
- Accommodating special needs
- Providing for special dietary requirements
- Preventing the spread of communicable disease
- Ensuring the security of medical records and medications
- Monitoring the health of the shelter population
- Maintaining 24-hour medical consultation
- Record keeping
### Health and Mental Health Services Coaching Aid – Continued

**Transition for Closing**
- Discuss triggers that could signal it is time to close the shelter.
- Discuss any information needed from health and mental health in order to make a shelter closing determination.

**Closing the Shelter**
- Returning supplies and equipment
- Returning the area to its previous condition
- Document retention

**Demonstrate**
- Refer to the pre-identified items you selected to demonstrate for the trainee.
- Demonstrate these processes. Suggested processes for health and mental health could include:
  - Health assessment form
  - Record security
  - Medicine security
  - Contact information
  - Other Record Keeping
- Ensure the trainee feels confident completing each of the selected tasks.
- Respond to any questions the trainee may have.
- Review the Health and Mental Health Checklist with the trainee. Provide copies for the trainee to use.

**Observe**
- Have the trainee shadow you during a shift.
- Allow the trainee to complete tasks and observe his/her performance.
- Provide assistance as needed and answer any questions.

**Reinforce**
- Remember every individual learns at his/her own pace.
- Reinforce learning by:
  - Encouraging the trainee to ask questions.
  - Being available to answer questions and demonstrate tasks.
  - Explaining the support agency policies and procedures, local/state laws, or other guidance that governs health and mental health policy.
## Tools and Resources

### Resource Links

<table>
<thead>
<tr>
<th>Resource Link</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>AA website</td>
<td><a href="http://www.aa.org">www.aa.org</a></td>
</tr>
<tr>
<td>American Humane Association</td>
<td><a href="http://www.americanhumane.org">www.americanhumane.org</a></td>
</tr>
<tr>
<td>American Red Cross</td>
<td><a href="http://www.redcross.org">www.redcross.org</a></td>
</tr>
<tr>
<td>American Society for the Protection of Cruelty to Animals (ASPCA)</td>
<td><a href="http://www.aspca.org">www.aspca.org</a></td>
</tr>
<tr>
<td>Best Friends Animal Society</td>
<td><a href="http://www.bestfriends.org">www.bestfriends.org</a></td>
</tr>
<tr>
<td>Center For Disease Control (CDC) – Emergency Preparedness &amp; Response</td>
<td><a href="http://www.emergency.cdc.gov">www.emergency.cdc.gov</a></td>
</tr>
<tr>
<td>CDC Public Health Assessment and Surveillance Tools After a Disaster</td>
<td><a href="http://www.bt.cdc.gov/disasters/surveillance">www.bt.cdc.gov/disasters/surveillance</a></td>
</tr>
<tr>
<td>CDC Pandemic Flu Guide for Shelter</td>
<td><a href="http://www.cdc.gov/h1n1flu/guidance/emergency_shelters.htm">www.cdc.gov/h1n1flu/guidance/emergency_shelters.htm</a></td>
</tr>
<tr>
<td></td>
<td><a href="http://www.flu.gov/professional/community/emergencyshelters.html">www.flu.gov/professional/community/emergencyshelters.html</a></td>
</tr>
<tr>
<td>CDC Shelter Assessment Tool</td>
<td><a href="http://www.bt.cdc.gov/shelterassessment">www.bt.cdc.gov/shelterassessment</a></td>
</tr>
<tr>
<td>CDC Shelter Resources</td>
<td><a href="http://www.cdc.gov/nceh/ehs/ETP/shelter.htm">www.cdc.gov/nceh/ehs/ETP/shelter.htm</a></td>
</tr>
<tr>
<td>Department of Justice (DOJ) ADA Checklist for Shelters</td>
<td><a href="http://www.ada.gov/pcatoolkit/chap7shelterchk.htm">www.ada.gov/pcatoolkit/chap7shelterchk.htm</a></td>
</tr>
<tr>
<td>Disaster Planning - Meeting the Special Needs of Pregnant Women &amp; Infants - 6 Key Elements for Every Disaster Plan</td>
<td><a href="http://www.doh.state.fl.us/family/mch/disasterpreparedness/MODdisaster.pdf">www.doh.state.fl.us/family/mch/disasterpreparedness/MODdisaster.pdf</a></td>
</tr>
</tbody>
</table>
## Resource Links -- continued

<table>
<thead>
<tr>
<th>Resource</th>
<th>Description</th>
<th>Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>FEMA Public Assistance Guide</td>
<td><a href="http://www.fema.gov/government/grant/pa/pag07_t.shtm">www.fema.gov/government/grant/pa/pag07_t.shtm</a></td>
<td></td>
</tr>
<tr>
<td>Helping Families and Children Cope With Traumatic Events</td>
<td><a href="http://www.naccrra.org/for_parents/traumatic-events/">www.naccrra.org/for_parents/traumatic-events/</a></td>
<td></td>
</tr>
<tr>
<td>HHS Health Information Privacy Act (HIPPA) information</td>
<td><a href="http://www.hhs.gov/ocr/privacy/hipaa/understanding/index.html">www.hhs.gov/ocr/privacy/hipaa/understanding/index.html</a></td>
<td></td>
</tr>
<tr>
<td>Initial Intake &amp; Assessment Tool - HHS/American Red Cross</td>
<td><a href="http://www.acf.hhs.gov/ohsepr/snp/docs/disaster_shelter_initial_intake_tool.pdf">www.acf.hhs.gov/ohsepr/snp/docs/disaster_shelter_initial_intake_tool.pdf</a></td>
<td></td>
</tr>
<tr>
<td>National Child Care Information &amp; Technical Assistance Center - State Contacts</td>
<td><a href="http://nccic.acf.hhs.gov/statedata/dirs/index.cfm">http://nccic.acf.hhs.gov/statedata/dirs/index.cfm</a></td>
<td></td>
</tr>
<tr>
<td>National Shelter System (NSS)</td>
<td><a href="http://www.nss.communityos.org/cms">www.nss.communityos.org/cms</a></td>
<td></td>
</tr>
<tr>
<td>National Family Registry National Emergency Family Registry and Locator System (NFRLRS)</td>
<td><a href="http://www.fema.gov/media/fact_sheets/nefrls.shtm">www.fema.gov/media/fact_sheets/nefrls.shtm</a></td>
<td></td>
</tr>
<tr>
<td>NVOAD</td>
<td><a href="http://www.nvoad.org">www.nvoad.org</a></td>
<td></td>
</tr>
<tr>
<td>NVOAD Disaster Spiritual Care Points of Consensus</td>
<td><a href="http://www.nvoad.org/Portals/0/ESCC-SC-POC%20Final-weblayout.pdf">www.nvoad.org/Portals/0/ESCC-SC-POC%20Final-weblayout.pdf</a></td>
<td></td>
</tr>
<tr>
<td>Substance Abuse &amp; Mental Health Services Administration (SAMHSA)</td>
<td><a href="http://www.samhsa.gov">www.samhsa.gov</a></td>
<td></td>
</tr>
<tr>
<td>Safe and Well</td>
<td><a href="http://www.disastersafe.redcross.org">www.disastersafe.redcross.org</a></td>
<td></td>
</tr>
<tr>
<td>Section 508 Compliance</td>
<td><a href="http://www.section508.gov">www.section508.gov</a></td>
<td></td>
</tr>
</tbody>
</table>
Resource Links -- *continued*

<table>
<thead>
<tr>
<th>Resource Link</th>
<th>Website/Link</th>
</tr>
</thead>
<tbody>
<tr>
<td>ServSafe®</td>
<td><a href="http://www.servsafe.com">www.servsafe.com</a></td>
</tr>
<tr>
<td>Society of Animal Welfare Administrators (SAWA)</td>
<td><a href="http://www.sawanetwork.org">www.sawanetwork.org</a></td>
</tr>
<tr>
<td>State and/or FEMA Volunteer Reception Center processes</td>
<td><a href="http://www.serve.gov">www.serve.gov</a></td>
</tr>
<tr>
<td>The Humane Society of the United States (HSUS)</td>
<td><a href="http://www.hsus.org">www.hsus.org</a></td>
</tr>
<tr>
<td>The Sphere Project: Humanitarian Charter &amp; Minimum Standards in Disaster Response</td>
<td><a href="http://www.sphereproject.org/content/view/27/84">www.sphereproject.org/content/view/27/84</a></td>
</tr>
<tr>
<td>WHO: Environmental Health in Emergencies &amp; Disasters</td>
<td><a href="http://www.who.int/water_sanitation_health/hygiene/emergencies/en">www.who.int/water_sanitation_health/hygiene/emergencies/en</a></td>
</tr>
<tr>
<td>Women &amp; Infants Service Package (WISP)</td>
<td><a href="http://www.whiteribbonalliance.org/Resources/Documents/WISP_Final.07.27.07.pdf">www.whiteribbonalliance.org/Resources/Documents/WISP_Final.07.27.07.pdf</a></td>
</tr>
</tbody>
</table>