EMP Toolkit Procedures and Examples

For Developing and Managing an Equitable Wildfire Risk Mitigation Program

Created by Fire Adapted Methow Valley as a companion to its report:
Developing an Equitable Wildfire Risk Mitigation Program
June 2023

Click on links for EMP Toolkit Examples, Timeline and EMP Report.

I. INTRODUCTION

The content and opinions expressed herein are those of the authors and do not necessarily reflect the position or the policy of Fire Adapted Methow Valley's funders and administering organizations, and no official endorsements should be inferred. For a full list of funders who contributed to this EMP Toolkit, please see the acknowledgements at the end of this document.

Fire Adapted Methow Valley *(FAMV)*, a project of the Washington Resource Conservation and Development Council, created this *Equitable Mitigation Program (EMP) Development and Management Toolkit* (EMP Toolkit) to be utilized in conjunction with its report entitled *Developing an Equitable Wildfire Risk Mitigation Program, 2023* (The EMP Report).

Together, these two resources can assist organizations as they develop and manage a place-based wildfire risk mitigation program that provides the means and opportunity for underserved, over-burdened and historically marginalized community members to participate in fuel reduction, preparation of defensible space and/or minor home hardening.

Our two EMP resources represent one way a mitigation program can be grounded in equity. Our pilot program framework and its procedures reflect choices we made based on our place-based challenges, strengths and objectives. Your program framework and procedures may differ substantially from ours. We look forward to learning what you and others are developing and doing to address the many unmet mitigation needs.

II. UNPACKING THE EMP TOOLKIT - NAVIGATION AND USE

The ***EMP Toolkit*** is comprised of two main components:

1. **The Toolkit Procedures and Examples** (which you are reading)
   This component outlines the procedural steps for EMP development and management and connects you, the reader, via *hyperlinks*, to examples of some of the key documents utilized in FAMV's pilot EMP or developed in response to the pilot program. Personal or irrelevant information is redacted. These examples are not intended to serve as templates. Also included in this document are tips relating to some of the procedures and examples, as well as citations to specific sections of the EMP Report.

2. **The *Toolkit Timeline***
   This component is a Gantt chart for the EMP development and management steps. It provides a temporal visualization of all overlapping and interrelating consecutive steps for (a) initial program development and (b) a series of program cycles over a two-year timeframe.

Navigation:

- The EMP Toolkit components are housed in a Google Drive Folder entitled "*EMP Toolkit*."

- Tips, examples, report section citations are all color-coded within the **EMP Toolkit Procedures and Examples** (which you are reading):

  Tip: …

  Hyperlinked Examples

  Rpt.Sec. x, pp. x-xx

- Move from the **EMP Toolkit Procedures and Examples** to the **EMP Report** or the **EMP Toolkit Timeline** by using the **orange** and **blue** buttons in the footer of this document.

- Links to the ***Examples*** are provided within each section of this document.

  Tip: For context and guidance on specific steps, refer to the EMP Report or the EMP Report Sections (Rpt.Sec.). Use the orange EMP Report button in the footer to access the EMP Report.

Definitions:

In the EMP Toolkit, we refer to stakeholders, applicants, clients, and partners (specifically recruitment partners and workforce partners). Here is what we mean by each of these terms:

- Stakeholders: Community members or entities that have an interest or concern in the equitable wildfire risk mitigation within your area.
- Applicants: All individuals who apply to receive mitigation assistance through the EMP.
- Clients: The individuals who are selected to be assisted by the EMP.
- Partners: These are the entities that collaborate with the EMP organization. Partners' responsibilities and roles can relate to any aspect of EMP development or ongoing programmatic management. Within the program cycle, partners serve two different roles or functions:
  - Recruitment Partners: These partners collaborate with the EMP organization specifically to assist with recruiting applicants and assisting with the application and selection process.
  - Workforce Partners: These partners collaborate with the EMP organization specifically to assist with preparing for, planning and implementing mitigation treatments.

III. PROCEDURES AND EXAMPLES

A. PROGRAM DEVELOPMENT

A1 Research and Gather Data

A1.1 Equity-Focused Mitigation Organizations

Gather information from resources, individuals and equity-focused mitigation organizations via
- Fire Adapted Communities Learning Network blogs, webinars and workshops,
- the information in this EMP Report and Toolkit, and
- interviews, surveys and informational requests to equity-focused mitigation organizations.

Conduct research to determine
- how equity-focused mitigation programs in your area, state or region are serving their communities, and
- about their programs' framework, scope, methodologies and procedures.

Examples:

Interview Script for Mitigation Organizations
Summary Tables with Questions Posed to Mitigation Organizations
Resource List re Equity-Focus Mitigation Work & Organizations

A1.2 Community Stakeholders

Interview and survey local stakeholders, including your organization's board and leadership, to learn:

- ☐ the strengths, challenges, needs, and available resources of
  - ☐ the geographical area that the EMP will serve,
  - ☐ the community that the EMP will serve, and
  - ☐ your EMP organization itself;
- ☐ the existing capacities that your organization and others in the community have to support an EMP;
- ☐ the community stakeholders' and your separate objectives and desired outcomes for coexisting with wildfire within the community; and
- ☐ where or how your and community stakeholders' objectives and desired outcomes align.

Examples:

Outreach to stakeholders
Email explaining the surveys/interviews being conducted
Survey of Methow Valley community members
Survey to Methow Valley organizations re volunteers
Email to Methow Valley organizations re survey re volunteers
Survey to social service organizations re social vulnerability factors that raise barriers to community member fire adaptation
Email to social service organizations re survey
Survey to pre and early pilot EMP clients

A1.3 Research Local Plans, Studies and Reports

Review data and information about your local area from sources such as

- ☐ comprehensive wildfire protection plans for specific neighborhoods, municipalities, or county(ies),
- ☐ multi-hazard mitigation plans,
- ☐ Federal Emergency Management Agency (FEMA) National Risk Index,
- ☐ United States Forest Service (USFS) and other wildfire risk maps,
- ☐ federal and state reports and strategic plans identifying the wildfire risks in the geographic area,
- ☐ local socioeconomic and demographic studies, reports and data (sourced from local or national agencies and organizations), and
- ☐ other sources, such as newspaper articles, blogs, and podcasts about your area and community.

Gain an understanding of

- the area's and community's strengths, challenges/barriers, needs and resources,
- historically marginalized, underserved and overburdened community members,
- existing barriers to accessing and participating in wildfire risk mitigation actions, and
- existing, proposed or planned wildfire preparation, response and recovery programs available to assist community members before, during and after a wildfire.

Examples:

FEMA National Risk Index
USFS and other wildfire risk maps
United States Forest Service. (2022). Wildfire crisis strategy: Confronting the wildfire crisis. United States Department of Agriculture
Washington State Department of Natural Resources. (2019). *Washington state wildland fire protection 10-year strategic plan, 2nd ed.*
Washington State Department of Natural Resources. 20-Year forest health strategic plan: Eastern Washington
Headwaters Economics
Washington State Office of Financial Management - county data
The Washington State Self-Sufficiency Calculator
DNR Landscape Evaluation Summary of Methow Valley (See Append. D to WA DNR (2020). Forest Health Assessment and Treatment Framework)
Methow Conservancy Resources re the "State of the Methow"
A Comprehensive Economic Study of the Methow Valley
Western Washington University Sustainable Pathways Program Study re: creating a youth climate corps
State Listing of Firewise USA Sites

A2 Analyze, Synthesize and Evaluate

Identify the common themes that emerge from information gathered in A1 so you can

- summarize and synthesize your findings,
- evaluate and begin to conceptualize
  - possible program parameters (scope and methodology), e.g.,
    - who will you serve,
    - what mitigation treatments will be performed, and
    - who will perform the mitigation treatments, and
  - the desired outcomes and objectives for the EMP and the community.

Tip: See discussion in EMP Report of what influenced FAMV's decisions regarding its EMP framework. Rpt.Sec "Context-Objectives Matrix," pp. 16-17, and App. B, pp. 100-105.

Examples:

FAMV's Methow Valley Context-Objectives Matrix
Summary Tables and Questions to Mitigation Organizations
Themes arising from research (sample pages)
Packet prepared re analysis, synthesis and evaluation of information learned (to be provided to stakeholders in A3 below).

A3 Align with Stakeholders

Meet with key stakeholders and potential EMP collaborators ("partners") to

- share the results of your research and analysis,
- share your recommendations for the EMP framework concept, objectives and desired outcomes,
- request feedback and stakeholder/partner perspectives, and
- seek alignment and collaboration.

Examples:

Agenda for meeting with stakeholders
Packet prepared for stakeholders
Presentation made to stakeholders
Post meeting outreach to partners following up on alignment and collaboration

A4 Develop the EMP

A4.1 Prepare a Strategic Plan

Based on everything learned in A1-A3

- outline the program framework (Rept. Context-Matrix, p. 16, Rept. App. B),
- identify the roles and responsibilities of EMP leadership, staff, contractors and collaborating partners (Rpt.Sec. 13, pp. 60-62),
- outline a budget for program start-up and management, and
- prepare a multi-year funding plan (Rpt.Sec. 15, pp. 66-72).

Tip: Existing capacity and program objectives may influence whether you choose to limit the number of EMP workforce partners, the scope of work for each client by mitigation treatment types, and/or the number of hours spent at one property.

Examples:

Outreach to partners re identifying roles, commitment, their objectives

A4.2 Establish the EMP Criteria, Protocols, Procedures, Timelines and Systems

Before the EMP is launched, finalize program component procedures, criteria, protocols, timelines and systems, focusing on the following

- **Criteria, Protocols and Procedures** including
  - area to be served by EMP,
  - client eligibility criteria (Rpt.Sec. 3, pp. 32-37),
  - client cost contribution criteria (Rpt.Sec. 4, pp. 37-39),
  - client selection protocol (Rpt.Sec. 3, pp. 32-37, Rpt.Sec. 13, pp. 60-62),
  - client in-kind match contribution criteria and protocols (Rpt.Sec. 4, pp. 38-39),
  - prioritization of client properties (Rpt.Sec. 10, pp. 51-53),
  - partner selection/profile criteria (Rpt.Sec. 7, pp. 44-46),
  - partner in-kind or cash match tracking protocols (Rpt.Sec. 11, p. 56),
  - partner training, vetting, safety protocols (Rpt.Sec. 7, pp. 44-46, and Rpt.Sec. 11, p. 56),
  - types and extent of treatments to be conducted on clients' properties (Rpt.Sec. 8, pp. 46-49, and Rpt.Sec. 11, pp. 54-57),
  - types and extent of assessments to be conducted on client property (Rpt.Sec. 8, pp. 46-49),
  - who will perform risk assessments and mitigation treatments (Rpt.Secs. 6-9, pp. 41- 51), and
  - initial staff needed to set up and begin running the program (Rpt.Sec. 13, pp. 60-62).

  See Examples in the specific step sections below.

- **Program Cycle Timeline** (Rpt.Sec. 14, pp. 62-66)

Develop the program cycle timeline that reflects the EMP components and factors in aligned objectives and outcomes, and the realities of place.

- Start by determining what local factors (see Rpt.Sec. 14) will impact timing of mitigation treatment implementation.
  - Identify the best months of the year for mitigation treatment implementation in your area based on all local factors that could impact the timing.
  - Once you establish your local mitigation implementation "windows", work backward in time from those "windows" to identify the appropriate calendar months for the preceding program steps.

Tip: Although mitigation treatment implementation is the final programmatic step, the timing of this step is determined by external factors and cannot be altered. The timing for all EMP steps preceding mitigation implementation will be determined by when mitigation treatments can happen.

See the Toolkit Timeline. The months when mitigation can be implemented in our area are October-November and April-July. We highlighted these months in green and worked backwards from both mitigation implementation periods to determine when all other program steps could be performed.

Examples:

EMP Toolkit Timeline

- **Program Management Systems** (Rpt.Sec. 14, pp. 60-62)
  - develop the programmatic data tracking spreadsheets and administrative program management systems;
  - manage and track information relating to all program participants (clients, workforce partners, EMP staff, individual volunteers, contractors, and workforce supervisors) and program steps identified in the Toolkit Timeline;
  - manage and track data relating to mitigation metrics to measure and demonstrate performance
    - clients onboarded and assisted,
    - acres treated,
    - treatments performed,
    - proximity to other treatments,
    - all in-kind and cash-match hours and dollars,
    - program expenses, and
    - specific metrics relating to each program component as needed by EMP or required by funders.

Tip: Consider using a Gantt chart like the EMP Toolkit Timeline as portal into all your data tracking spreadsheets. You can set up separate, but linked spreadsheets for each step of the program cycle.

Examples:

EMP Toolkit Timeline
Applicant/Client Data Tracking Workbook
Partner Data Tracking Workbook
Match and Metric Tracking Spreadsheet
Scope of Work template form

B. PROGRAM MANAGEMENT (COMPONENTS AND STEPS)

B1. Clients

B1.1 Client Outreach (Rpt.F&R.Sec. 1, p. 29-30)

- Establish annual client application/selection periods.

- Identify and pursue best methods to connect with EMP target populations:
  - correspond with local organizations and groups[1] whose members or clients may be eligible for the EMP;
    - introduce the EMP concept and its relevance to their members and/or clients, and
    - collaborate in recruiting EMP applicants;
  - announce the open application period on media platforms;
  - provide press releases, interviews and outreach materials to local news outlets and local organizations for publication;
  - table at local gatherings, grocery stores or community centers, holiday bazaars, festivals and/or farmers' markets;
  - distribute fliers and EMP application forms within the community;
  - host presentations or ask to present with collaborating partners;
  - host presentations or ask to present at community forums and gatherings; and
  - engage neighborhoods or neighborhood committees involved in wildfire preparation.

Examples:

Recruitment Partner/Prospective Client Outreach Spreadsheet

B1.2 Client Application

- The application form must elicit the information necessary to
  - demonstrate whether the applicant meets the EMP's eligibility criteria,
  - fulfill funders' and partners' requirements for proof of eligibility,
  - enable partners to share completed applications with the EMP staff, and
  - establish best forms of communication with the applicant.
- Set up and promote events to help potential EMP applicants complete application forms by
  - collaborating with partners, and
  - hosting open application completion events at a neutral and easy to access location.

Examples:

EMP Client Application

[1] Such as social service organizations; faith communities; community service and neighborhood organizations; affinity groups; clubs; collectives and coalitions.

B1.3 Client Selection

- Establish a Client Selection Committee to review EMP applications and select clients.
- The client selection process will need to follow the protocol determined by EMP leadership and refined by the Client Selection Committee to address any details that need improvement.

Examples:

Application/Client Selection Spreadsheet

Tip: Consider including collaborating partners and former EMP clients on the selection committee. Their participation can strengthen the EMP's understanding of best practices for identifying and selecting the community's underserved, overburdened and historically marginalized members.

B1.4 Client Onboarding – Management and Notification

- Enter a new client's application information into client data spreadsheets to track status and progress of onboarding and mitigation planning, preparation, implementation, and to record client's in-kind match activities and hours.

Tip: Augment the data tracking spreadsheet throughout the EMP process as you learn more about each client.

- Inform the new client that they are eligible for either
  - no-cost, or
  - low-cost mitigation assistance.

- Provide the client an outline of the onboarding steps so they know what to expect. These steps include:
  - phone call or email to set up a meeting and risk assessment,
  - first EMP meeting and a risk assessment at client's home,
  - prioritizing the scheduling of all EMP clients' properties for upcoming implementation period,
  - preparing the mitigation treatment Scope of Work (SOW),
  - second EMP meeting with client to finalize the SOW and sign a Memorandum of Understanding (MOU),
  - EMP staff and/or client completing any requisite pre-mitigation steps such as confirming property boundaries with neighbors, and
  - EMP staff identifying and scheduling the crews with the appropriate skill, capability and age levels needed for the work to be performed.

Tip: Help prepare the client for any eventuality. Explain the anticipated mitigation schedule and crew types and discuss the factors that could cause treatment implementation delays. (See Rpt.Sec. 9, pp. 49-51 for context.)

Examples:

[Client Onboarding Spreadsheet]

B1.5 Client Onboarding – Assessment and Meetings (Rpt.Secs. 5, pp 39-41 & 8, pp. 46-49)

In the first meeting with the client

- confirm all information needed to prepare the MOU and, to the extent possible, the SOW;
- explain the EMP staff's, partners' and client's collaborative roles and responsibilities;
- answer any questions the client has;
- learn what support systems the client has, e.g., whether they have family members, friends or neighbors who could provide, occasional assistance with mitigation actions or maintenance;
- walk the property with the risk assessor and client (if the client is able) to
  - identify mitigation actions needed (this is often termed as a "risk assessment" or "hazards assessment"),
  - discuss both the mitigation treatments that can be implemented by diverse workforce partners (or clients with neighbors, friends and family) and any concerns the client raises about the treatments, and
  - weigh options for alternative treatments and maintenance options for the property. This should include examining the client's ability (physically and/or financially) to maintain different treatments (either on their own or through assistance) and treatments that require little maintenance but may not be as attractive (visually, financially, etc.) to the client --for example, replacing vegetation with weed cloth and gravel in the Home Ignition Zone (HIZ) 1; and
  - begin to assess whether the client's property is one that will be considered a high priority for treatment scheduling (see B1.6 below).

- ask the assessor for a copy of the completed assessment report
  - to refer to in preparing the SOW/treatment plan, and
  - to attach to the MOU.

Tip: EMP clients may benefit from learning about other programs and resources that can help them prepare themselves and their loved ones for wildfire. If they are interested, share information about programs for emergency response alerts, reflective address signs, and disaster preparedness and evacuation planning.

Examples:

Client Onboarding Spreadsheet
Client Property Information Spreadsheet
Email notification to client re assessment w/follow-up
Okanogan Conservation District Assessment and Notes
DNR Wildfire Ready Neighbors Home Risk Assessment Form

B1.6 Client Onboarding – Prioritization (Rpt.Sec. 10, pp. 51-53)

You can prioritize mitigation treatments on client properties on a first-come, first-served basis or based on other factors such as cross-boundary mitigation benefits and scale of treatments or implementation efficiency. For example,

- prioritize treatments on client properties that are
  - close to other client properties (treatment connectivity/landscape-level risk reduction),
  - close to other mitigation projects (on private, public, industrial, and other land types), and
  - in or close to areas with particularly high wildfire transmission or ingress/egress risks.

Tip: Weather, ground and fuel conditions, and availability of crew, equipment and materials ultimately will dictate mitigation treatment scheduling.

B1.7 Client Onboarding – Scope of Work; Treatment Menu

The SOW shows, among other things, the mitigation treatments to be completed, who will implement the treatments and how they will implement them.

- After the assessment, begin to prepare the SOW (see section B2.4 below).
  - Include the implementation treatments to be performed and the type of crew needed to perform the work (based on skill sets, physical capabilities, potential liabilities in the work performed and age of crew – minors need parental/guardian permissions for participation).
  - Update the Client Data Tracking Spreadsheet with the SOW information.
- Share the SOW with the client for review, questions and approval.

Examples:

Scope of Work (see also examples section B.4 below)
List of Types of Mitigation Work that Workforce Crews can Perform

Refer to section B2.3 below

Tip 1: Workforce partners can assist with preparing the SOW.

Tip 2: If the client has family members, friends and neighbors who want to help with some mitigation projects that EMP workforce crews cannot perform, add these mitigation projects and assignments to the scope of work. Support the client with coordinating family, friends and/or neighbors and in tracking the additional "in-kind" match time.

B1.8 Client Onboarding – Memorandum of Understanding

The MOU is the one document that reflects everything the EMP staff and EMP client have agreed to.

- Prepare the MOU and all attachments to it, including:
  - the written agreement,
  - the risk assessment,
  - the scope of work, and
  - all waivers and other forms:
    - liability waivers,
    - photographic waivers,
    - landlord permissions (if applicable),
    - "in-kind" match tracking forms for clients to complete, and
    - right of entry forms required by some workforce partners.
- Meet with the client to review the MOU and all of its attachments and come to a final agreement.
- The client is ready for treatments to begin once they have signed the MOU.

Examples:

Client Onboarding Data Tracking Spreadsheet
EMP Intro Letter to Clients of MOU and SOW
MOU with EMP client who owns their home
MOU Treatment Rx with Client who owns their home
MOU with EMP client who rents their home
MOU with EMP client who rents their home – addendum
MOU Treatment Rx with Client who rents their home -1st treatment
MOU Treatment Rx with Client who rents their home – 2nd treatment
Example of completed client Match Track form

B2. Partners/Workforce

A reminder: EMP partners are the entities that collaborate with the EMP organization. Partners' responsibilities and roles can relate to any aspect of the EMP. The steps below can apply to all partners, regardless of their role; however, our main focus is on workforce partners – the ones directly involved with preparing for (e.g., conducting assessments, preparing scopes of work, meeting with clients), planning (matching treatments with workforce partners, scheduling work parties, determining equipment and volume of materials needed and arranging to secure the equipment and materials, etc.) and implementing mitigation treatments.

B2.1 Partner/Workforce Outreach

Coinciding with step B1.1 above, identify and reach out to potential partners who can assist with mitigation preparation, planning and implementation (workforce partners).

These prospective workforce partners may be

- **community service and neighborhood organizations, affinity groups, and faith communities. Please note that some of these groups may already be collaborating with the EMP organization and staff to recruit EMP applicants (recruitment partners), or**
- **agencies, organizations and contractors involved with fuel management, wildfire mitigation, fire suppression and recovery.***

These workforce partners can

- **help recruit and provide mitigation crew, i.e., volunteers and/or employees from their own organizations or donate paid job corps members,**
- **conduct risk assessments,**
- **help prepare mitigation treatment scopes of work,**
- **help coordinate and schedule crew, equipment and supplies and track all in-kind or cost match accrued by their crew and organization, and**
- **participate in mitigation treatment implementation and crew coordination and supervision.**

***** These types of partners might include state natural resources departments and conservation districts, forest collaboratives and cooperatives, county fire districts, long term recovery groups, volunteer organizations that focus on recovery from hazard events and mitigation, and student and youth programs.

Tip: Outreach to recruit workforce partners should coincide with outreach to recruit EMP applicants because many of the partners who can assist with recruiting EMP applicants from their membership also will have members who are interested in providing community service. For example, affinity groups, community service organizations and

faith communities typically share both the desire to (1) help their own members who need assistance and (2) perform service to those needing assistance in the greater community.

- Correspond with these prospective workforce partners to
  - introduce the EMP concept and its relevance to the organization's mission, goals and membership, and
  - explore ways that the organization and its members could become an EMP workforce partner and participate in EMP risk mitigation work parties.

Tip 1: Encourage prospective workforce partners to commit to recruiting and coordinating their own crew of volunteers for EMP work parties rather than soliciting their members to reach out separately to the EMP for individual assignments. This latter approach would entail additional EMP staff and funding capacity.

Tip 2: A workforce partner may choose to donate the use of existing crews. For example, WA DNR donated several weeks of Forest Health Technician and AmeriCorps crew time to FAMV's pilot EMP for reducing fuels in EMP clients' HIZ 2 and 3.

- Establish annual workforce partners outreach and recruitment periods and advertise them via
  - announcements on social media platforms, and
  - press releases and outreach materials to local news outlets and local organizations for publication.

- Use this annual workforce partner outreach period to reconnect with existing partners to
  - review the upcoming program cycle, and
  - if necessary, update their existing Partner Profiles and MOUs.

Examples:

EMP Toolkit Timeline
Outreach to potential workforce partner re service project
Partner Application and Profile Information Spreadsheet
Partner Onboarding Data Tracking Spreadsheet
Partner Organization Types List

B2.2 Partner/Workforce Application (Rpt.Sec. 7, pp. 44-46)

Have all prospective partners (regardless of their intended roles and responsibilities) complete an application.

The partner/workforce application form should elicit all information needed to
- prepare a Partner Profile (See Procedures Step B2.4),
- assign each partner to the types of work that match their skill, capability and age levels and their organizational goals and parameters,

- understand and satisfy each partner's specific objectives, scheduling requirements and other needs,
- be able to estimate potential in-kind and cash-match amounts for grant proposals and budgeting, and
- prepare an MOU.

Examples:

Workforce Partner Profile Spreadsheet
Partner Application and Profile Information Spreadsheet
Partner Onboarding Data Tracking Spreadsheet
Partner Organization Types List

B2.3 Partner/Workforce Selection and Onboarding (Rpt.Secs. 7, pp. 44-46 & 9, pp 49-51)

Once you have selected a partner

- enter all application information into the Partner Data Tracking Spreadsheet;
- create a Partner Profile (see B2.4 below);
- meet with the partner to discuss and agree on
  - the scope of your collaboration,
  - each other's respective roles and responsibilities,
  - the partner's specific objectives, goals, requirements and needs,
  - the specific details relating to the partner's crew capabilities, skills, age, needs, etc.,
  - the types of mitigation treatments they will perform,
  - timing and scheduling for upcoming assessments and/or mitigation implementation work parties, and
  - best way to formalize your agreement, whether through an MOU or via email or letter.

Tip: The data collected from the workforce partner's application is relied upon and augmented throughout the program cycle. These same data are reflected and utilized in various ways within multiple spreadsheets and forms, such as the partner data tracking spreadsheet, the partner profile, the MOU, the scopes of work for each client property, and the spreadsheets tracking all mitigation work parties and metrics during a program cycle. Data can be pulled from one Excel spreadsheet into another by linking the spreadsheets.

Examples:

See examples for B2.1 and B2.2.

B2.4 Partner/Workforce Profile (Rpt.Sec. 7, pp. 44-46)

The Partner Profile can be either a stand-alone document or a report created from the Partner Tracking Spreadsheet Workbook. It delineates all information about the partner necessary to

- assign them to the appropriate types of client mitigation projects that suit their skills, physical capabilities, status as minor(s) or adult(s), and equipment resources,
- schedule the partner at client locations in the area(s) the partner serves, and for the number and duration of work parties the partner has agreed to,
- provide the level of supervision, training, and education the partner needs or seeks, and
- prepare the age-appropriate liability waiver (minor or adult), permissions and emergency contact forms.

The Partner Profile identifies the foundational information for the MOU's terms and conditions.

Examples:

Partner Data Tracking Spreadsheets Workbook

B2.5 Partner/Workforce – Memorandum of Understanding

The MOU serves as a roadmap for how the EMP and the partner work together. It should lay out everything a partner and the EMP have agreed to. The MOU is a legally binding contract.

The MOU may include the following:

- the narrative agreement of all terms and conditions as identified in the Partner Profile, plus
- any other documents relating to and made a part of the agreement (attached as exhibits or, if prepared at a later date, addenda, to the MOU) including:
  - all waivers and forms including the liability waiver,
  - agreement to be photographed,
  - medical contact agreement,
  - confidentiality form,
  - "in-kind" match tracking form for workforce partners and their crew to complete,
  - right of entry forms required by some workforce partners,
  - landlord permission (if appropriate),
  - the dates the partner has agreed to be available for mitigation treatment work parties,
  - an MOU addendum with the schedule of all clients, assessments, treatments and work parties (dates and anticipated duration) that the partner has agreed to, and
  - a second MOU addendum with the scopes of work for the specific treatments they will be performing.

- If you hire independent contractors, utilize a contract rather than an MOU, but include the same attachments to the contract.

Tip: Some partners already have their own systems in place for coordinating their members or students in volunteer service projects. They may have already required their members to provide proof of insurance, sign liability waivers, and complete a medical contact form.

Examples:

FAMV-Workforce Partner MOU
FAMV-Contractor Contract for Services
Liability Waiver WF Crew (adult)
Liability Waiver WF Crew (minor and parent/guardian)

B3 Mitigation Treatment Planning and Scheduling (Rpt.Secs. 9-11, pp. 49 – 57)

- Using the data pulled from all Client Scopes of Work and Workforce Partner Profiles, determine and record in the appropriate Data Tracking Spreadsheets
  - the treatments to be implemented and the types of crew needed to perform each treatment,
  - the potential date ranges for implementation of each treatment,
  - the implementation dates for each treatment,
  - the workforce partner(s) assigned to the different treatments to be implemented, and
  - the equipment, machinery, tools, materials, supplies and safety equipment needed to perform the work at each client location and who is responsible for bringing/providing the items/materials.

- Schedule or secure
  - the workforce partners and crews,
  - delivery of porta potties, dumpsters, gravel, and

all other items and materials. (See text box below on page 20, **An example of the planning and scheduling process**)

- Provide each workforce partner with a spreadsheet-generated report of the client properties, mitigation treatments and corresponding dates they are responsible for. Make this report an addendum to the MOU.
- Coordinate with workforce partners to obtain all forms signed by crew members or their legal guardians if they are under 18 years old.

Examples:

EMP Toolkit Timeline
Match and Metrics Tracking Spreadsheet
Final Planning – email re scheduling mitigation implementation
Logistics -email re waivers, tools, partners' roles
Vendors Materials, Equipment, Supplies – delivery and Invoices Spreadsheet
Scope of Work
Client Property Information Spreadsheet

Workforce Partner Profile
Workforce Partner Waiver form (adult)
Workforce Partner Waiver from (minor)

An example of the planning and scheduling process:

Consider this scenario: A client's property is adjacent to public and other private fuel reduction projects and is therefore prioritized to be treated as soon as possible. However, this client lives in a high elevation area where the snow doesn't melt until mid-late May. THEREFORE,

- treatments cannot begin as soon as they might in another location within the EMP service area.

The client has dense trees in HIZ 2 and 3 to be thinned. THEREFORE,

- a workforce partner with a skilled chainsaw crew and access to a chipper is needed, and
- per EMP's protocols, chainsaw and chipper work must be done by June 30th.

To accomplish the HIZ 2 and 3 thinning for this client, the EMP staff must schedule

- **a skilled workforce partner between mid-May and June.**

The client also needs HIZ 1 mitigation - vegetation removed and gravel laid down. THEREFORE,

- a workforce partner with a non-technical crew that is physically capable of moving and laying the gravel is needed. This same crew could remove the vegetation and prepare the soil for the gravel in HIZ 1 or another workforce partner with an unskilled crew of students or other youth could remove the vegetation and prepare the soil.
- Some student and youth crews are not available until late June or July.
- The gravel work must be performed after the soil has dried out.

To accomplish vegetation removal and graveling in HIZ 1, the EMP staff must schedule

- **either one or two workforce partners between June and July.**

Summary: Mitigating the risks for this client will involve two or three workforce partners and two different implementation periods.

B4 Mitigation Treatment Implementation

- Begin each mitigation treatment work party with a meeting to
  - introduce all participants, including the EMP client (if the client wishes to participate),
  - discuss what the EMP is and why the work is so important,
  - collect all outstanding signed forms,
  - get all participants signed in on the work party's Match and Metric Tracking Spreadsheet,

- discuss safety protocol, best practices for mitigation work, work guidelines and Industrial Fire Protection Levels currently in effect (if you choose to conduct treatments when any level of IFPLs are in place), and expectations for the day, and
- discuss and provide instructions on all treatments to be performed.

- Use your Work Party Checklist to identify all supplies, tools, safety items, materials, etc. brought to the work party.

- Staff the work party with an EMP mitigation implementation leader and a workforce partner crew lead who will collaboratively
  - instruct and guide the crew,
  - ensure safety protocols are being used,
  - answer all questions,
  - take photographs of the crew and the work,
  - confer as needed,
  - gather all paperwork, tools and supplies at the end of the work party,
  - have each crew member complete the Match and Metric Tracking Spreadsheet by indicating the number of hours they worked
  - record on the Match and Metric Tracking Spreadsheet all treatment metrics, and take note of any treatments not completed,
  - check in with the EMP client before leaving site.

Tip 1: The EMP staff must set the expectations for and be present during all work parties involving volunteers and at least be available by phone during the work party of paid professionals.

Tip 2: Depending upon the workforce partner participating, you may want to hold a mid-work party break coupled with a learning opportunity and discussion.

Examples:

Checklist for Implementation Work Party

B5 Post-treatment Follow-up

- Hold an 'after action review' with workforce partners to explore what worked well, what were the challenges, and what can be done differently in future work parties.
- Document what you have learned for future treatments and for reporting to grant funders.

- Obtain from workforce partners and EMP clients the following:
  - Status of work accomplished and SOW activities not completed;
  - Any borrowed tools, PPE, and other materials;
  - All data and information to update client and workforce data spreadsheets and prepare grant close out reports, including:
    - all completed match tracking spreadsheets,

- all uncollected crew waivers, and
- photographs taken by crew and clients (with photographer and context identified); and
- any compelling stories that can be incorporated into the next round of applicant and workforce outreach.

- Check in with EMP clients
  - for their feedback and to discuss any next steps or outcomes,
  - to show them photographs from the work party, and, depending upon your agreement with the clients, ask their permission to publish or post specific photos, and
  - to make sure vendors retrieved porta potties, dumpsters and any associated rental equipment from the project site.

Tip: Consider options for addressing any SOW activities not completed and take appropriate action.

- Celebrate your success with your partners, clients, and funders, and with your community, and beyond.

Examples:

Debriefing email

Tip: Be prepared to hear from neighbors in areas where the EMP implemented treatments – they may be interested in learning what they can do, too, to prepare their property!

IV. ACKNOWLEDEGMENTS

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