Bay Area Urban Area Security Initiative

Community Resilience Initiative

Community Recovery Coordination Platform Blueprint

December 2025

CONSTANT ASSOCIATES

BAY AREA URBAN AREAS SECURITY INITIATIVE

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Introduction

Purpose

This blueprint provides jurisdictions and community coalitions with a practical, vendor-neutral reference for building and governing their own Community Recovery Coordination Platform. It consolidates step-by-step guidance for configuring ArcGIS (Survey123, maps, and dashboards) and Microsoft Teams (channels, file organization, welcome posts, and automated notifications of new survey submissions), alongside an Administration Manual and troubleshooting resources, so local owners can deploy, maintain, and adapt the platform to their community's needs.

This platform brings together key components of two surveys, one about organizational capabilities and the other collecting recovery service requests and needs, into an integrated dashboard that enables partners to align community needs with available resources. The platform facilitates efficient local deployment, enhances collaborative efforts, and elevates situational awareness during long-term recovery operations. It is intended to supplement existing tools and meet jurisdictional reporting requirements, providing support to communities throughout the extended recovery period.

What Gaps Does this Platform Address?

Gaps were identified through a 2024 comprehensive technology assessment that included documentation review, focus groups with Bay Area practitioners, and analysis of current tools.

- **Fragmented Systems:** Current tools are siloed, making it difficult to share information and coordinate across agencies and organizations.
- **Limited Collaboration:** There's no central hub for government, NGOs, businesses, and community groups to work together efficiently.
- **Lack of Interoperability:** Existing platforms don't integrate well, leading to duplicated efforts and inefficient workflows.
- **Insufficient Data for Decision-Making:** Decision-makers lack real-time, actionable data aggregated from multiple sources.

Platform Benefits

- **Faster, More Coordinated Long-Term Recovery:** The platform streamlines how communities request and receive recovery services from each other, ensuring that needs are matched quickly with available resources across agencies and organizations.
- **Improved Access to Information:** Organizations gain a central hub for real-time updates, resource availability, and situational awareness, reducing confusion and ensuring everyone has the information they need.
- **Data-Driven Decision Making:** Communities benefit from dashboards and analytics that provide a clear picture of needs, resources, and progress, supporting more effective planning and advocacy.
- **Reduced Duplication and Gaps:** By connecting siloed systems and partners, the platform helps avoid duplicated efforts and ensures that no community or group is left behind.

Considerations

Before launching a Community Recovery Coordination Platform, it's essential to address several foundational considerations. These decisions will shape how the platform is governed, who can participate, how it is maintained, and how it adapts to evolving community needs. The following list outlines the most important considerations and presents options for each:

Key Considerations & Options

- **Platform Ownership and Hosting:** Who will house and manage the platform?
  - Option 1: Regional agency or community organization
  - Option 2: Lead jurisdiction (city or county)
  - Option 3: Third-party or trusted nonprofit partner
- **Access and Membership:** Who will have access to the platform?
  - Option 1: All member jurisdictions and their partners participating in recovery activities
  - Option 2: Limited to government agencies and designated NGOs
  - Option 3: Open to vetted community organizations, businesses, and volunteers
- **User Roles and Permissions:** What roles and permissions are needed?
  - Option 1: Administrator, Member, Guest
  - Option 2: Custom roles based on function (e.g., Data Manager, Communications Lead)
  - Option 3: Tiered access (public, partner, internal)
- **Duration and Lifecycle:** How long should the platform remain active?
  - Option 1: Year-round for ongoing preparedness and recovery
  - Option 2: Activated only during major incidents or recovery periods
  - Option 3: Phased approach (pilot, then permanent adoption)
- **Onboarding and Training:** How will new users be added and trained?
  - Option 1: Manual approval by administrators (current system)
  - Option 2: Training required before access is granted
- **Sunsetting and Transition:** What is the process for closing or transitioning the platform?
  - Option 1: Scheduled review and sunset date
  - Option 2: Transition plan to another system or permanent adoption
  - Option 3: Ongoing evaluation with flexibility to adapt

Requirements

Before building and launching the Community Recovery Coordination Platform, it's important to ensure that the managing organization has the necessary resources, technical capabilities, and administrative structure in place. The following requirements outline the essential elements for successful platform deployment and ongoing operations:

Key Requirements

Designated Administrative Staff

At least two staff members should be assigned as platform administrators. These individuals will be responsible for managing user access, supervising platform activity, and providing support to participants.

When new administrators are added, they should be given admin credentials. They should be assigned owner status for the Microsoft Teams (Make someone a team owner in Microsoft Teams - Microsoft Support) and added to a group to provide shared updates in ArcGIS (Create groups—ArcGIS Online Help | Documentation).

ArcGIS Online Account

The organization must have access to an ArcGIS Online account to enable mapping, dashboard, and survey functions. (Estimated cost: approximately $600 per user per year; actual pricing may vary based on licensing agreements and user tiers.)

Microsoft Teams Access

The managing organization must have Microsoft Teams access with the ability to create and manage Teams, channels, and file structures for collaboration.

Power Automate Access

For advanced workflow automation (such as automated notifications, survey integration, and custom triggers), access to Microsoft Power Automate is required. This may involve additional licensing or permissions.

Data Security and Privacy Controls

The platform must have clear protocols for data storage, sharing, and privacy, including role-based access controls and compliance with relevant regulations.

Technical Support and Maintenance

Ongoing technical support should be available, either through internal IT staff or external partners, to address issues, perform updates, and ensure platform reliability.

Sustainability Plan

The organization should identify funding sources and a plan for maintaining subscriptions, licenses, and administrative support over time.


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Building the Platform

Teams Site

Microsoft Teams was selected because the majority of community members and jurisdictions already had access to the Microsoft suite, making onboarding simple and cost-effective. Teams integrates seamlessly with collaboration, file sharing, and dashboard tools needed for recovery coordination. While Slack was considered, Teams offered better compatibility, enterprise security, and leveraged existing licenses, making it the most practical choice for broad participation.

How-To Guides and Resources

- Microsoft Support: Create a Team from Scratch in Microsoft Teams
  - Step-by-step instructions for creating a new team, organizing channels, setting privacy, and inviting members.
  - Create a team from scratch in Microsoft Teams
- Microsoft Learn: Teams for Nonprofit Organizations
  - Templates and guidance designed specifically for nonprofits, including volunteer management, onboarding, and resource sharing.
  - Teams for Nonprofit organizations - Microsoft Teams
- Microsoft Community Hub: Introduction to Setting Up Public or Private Teams
  - A concise guide for creating public or private teams, managing team settings, and configuring permissions for secure collaboration.
  - Introduction to Setting Up Public or Private Teams in Microsoft Teams

Key Components

Roles in Microsoft Teams and the Collaboration Platform

Clear role definitions are essential for secure, efficient, and collaborative use of Microsoft Teams and the Community Recovery Coordination Platform. Each role carries specific permissions and responsibilities, ensuring that users can participate appropriately while protecting sensitive information and maintaining platform integrity

- Owner status includes both platform creators and the administrators of the platform. Owners have the highest level of control to manage the platform, including membership and security.
- Members are internal users who actively participate in collaboration, communication, and platform activities. They have standard permissions to contribute and access shared resources.
- Guests are external users invited to join the Team or platform and will likely make up the majority of platform users. Their access is limited compared to Owners and Members, but they can still post within channels, contribute to shared files, and should be prioritized within the platform set up whenever possible.

Welcome Message

A Welcome Message is essential for orienting new and existing users to the Teams site. It sets the tone for collaboration, provides clarity on the platform's purpose, and ensures everyone knows where to find key resources. A well-crafted welcome post helps users quickly understand how to participate, where to access guides and training, and who to contact for support.

What to include in your Welcome Message:

- A brief introduction to the platform and its purpose.
- Reference to the user guide and any relevant training materials.
- A note about the event or initiative and who may be involved.
- Instructions for completing the new user survey.
- A summary of the information and resources available in other tabs (such as files, dashboard, and capabilities survey).
- Contact information for support or questions.

How to pin the Welcome Message: After posting your welcome message in the main channel, select the three dots ("...") next to the post and choose "Pin" to keep it at the top of the page. This ensures maximum visibility for all users, especially newcomers.

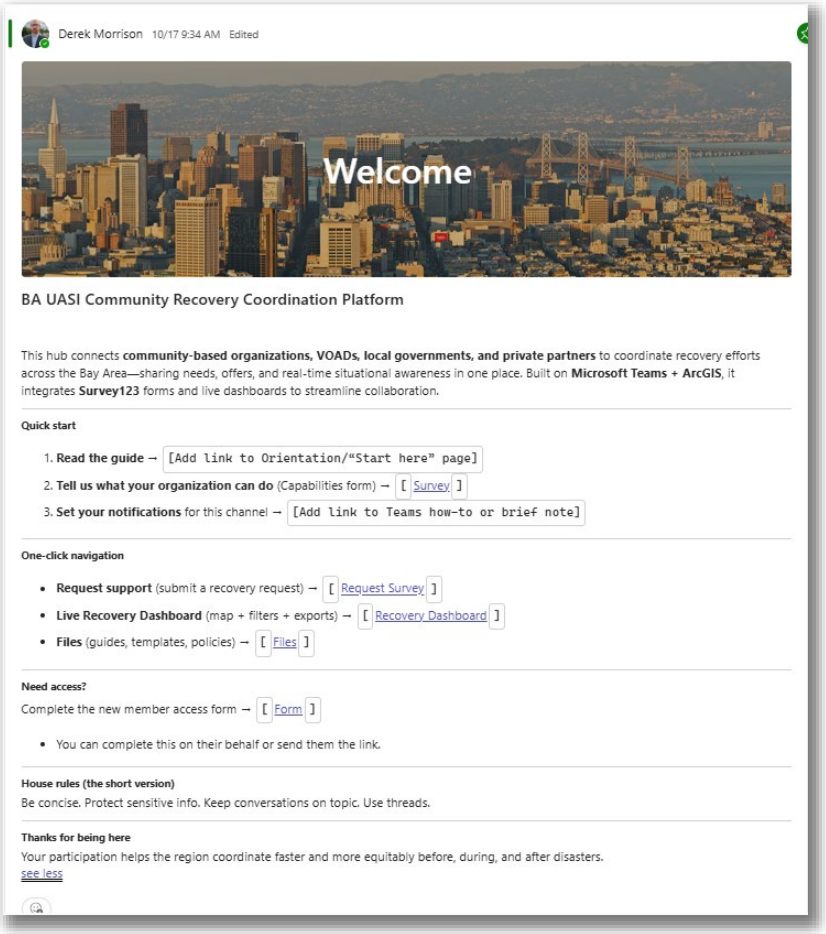

Image 1: Beta Platform Welcome Post

Folders and Templates

Prepopulating the Teams site with essential folders and templates is critical for efficient recovery operations. Having reimbursement templates readily available ensures that teams can quickly document expenses and submit claims, reducing delays and improving compliance with funding requirements. These templates help standardize submissions, making it easier for all participants to follow best practices and meet jurisdictional guidelines.

In addition to reimbursement resources, it's important to create an incident folder dedicated to organizing documents related to each event. This folder should include space for incident reports, supporting documentation, and after-action reviews. By centralizing these materials, teams can streamline the review process, facilitate lessons learned, and ensure that all necessary records are accessible for future reference and audits.

Example Folder Structure

Main Folders:

- Reimbursement Templates
  - Expense Claim Form
  - Supporting Documentation Checklist
  - Funding Source Guidelines
- Incident Documentation
  - Incident Reports
  - Situation Updates
  - After-Action Reviews
  - Lessons Learned
- General Resources
  - User Guides & Training Materials
  - Meeting Notes
  - Contact Lists
- Capabilities Survey Results
- Recovery Service Requests

How to Use:

- Prepopulate the "Reimbursement Templates" folder with standardized forms and checklists to ensure teams can quickly and accurately submit claims.
- Use the "Incident Documentation" folder to organize all materials related to each event, including reports, updates, and after-action reviews, supporting both immediate response and long-term improvement.
- Maintain "General Resources" for onboarding, training, and ongoing collaboration.

Using the Tabs

Adding tabs to the Teams site is a powerful way to create quick access points for essential resources and external tools. Tabs allow users to easily navigate to surveys, guides, and other web-based forms

directly from the Teams interface, streamlining participation and data collection during recovery operations.

Tabs also enable seamless integration with SharePoint sites, which is especially important for embedding the ArcGIS dashboard. This integration ensures that real-time data, maps, and analytics are always accessible within the platform, supporting situational awareness and coordinated decision-making.

How to Create a New Tab Using a Web URL in Teams

- Go to your Teams channel:
  - Open the channel where you want to add the tab.
- Click the "+" (Add a tab) icon:
  - This is located at the top of the channel window.
- Select "Website" from the list of tab options:
  - If your dashboard or resource is hosted on SharePoint, you can also choose the SharePoint option.
  - Survey123 has a web URL you can copy and paste into this section.
- Enter the URL and tab name:
  - Paste the web address of your dashboard or resource, and give the tab a descriptive name (e.g., "Recovery Dashboard").
- Click "Save":
  - The new tab will appear at the top of your channel, providing quick access for all team members.

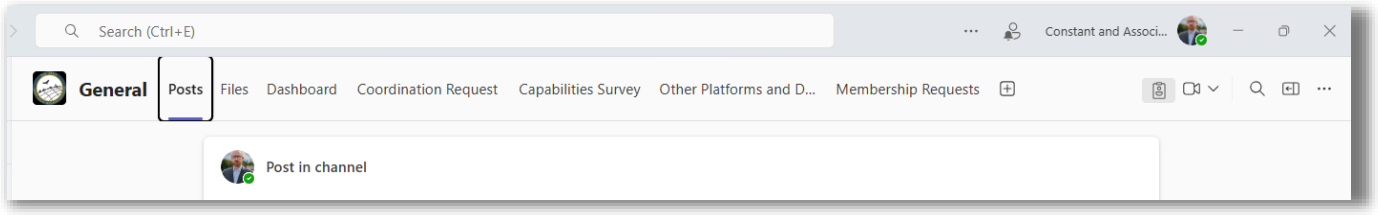

Image 2: Beta Platform Tabs

Microsoft Automate

Microsoft Automate has tremendous capabilities to provide updates, notifications, and communications between Microsoft Teams and ArcGIS. One method of utilizing the tool in this platform is to have Microsoft Automate send updates about survey responses to the team page. You can set this up by going into the Power Automate app. You'll need to connect the app to your ArcGIS account as well.

Within types of automatic flows, you can select a flow based on when a survey response is submitted. The next step in the flow is post card in a chat or channel. You'll need to enter the Team and Channel into the flow. The coding for this adaptive card is available here with a few placeholders on GitHub.

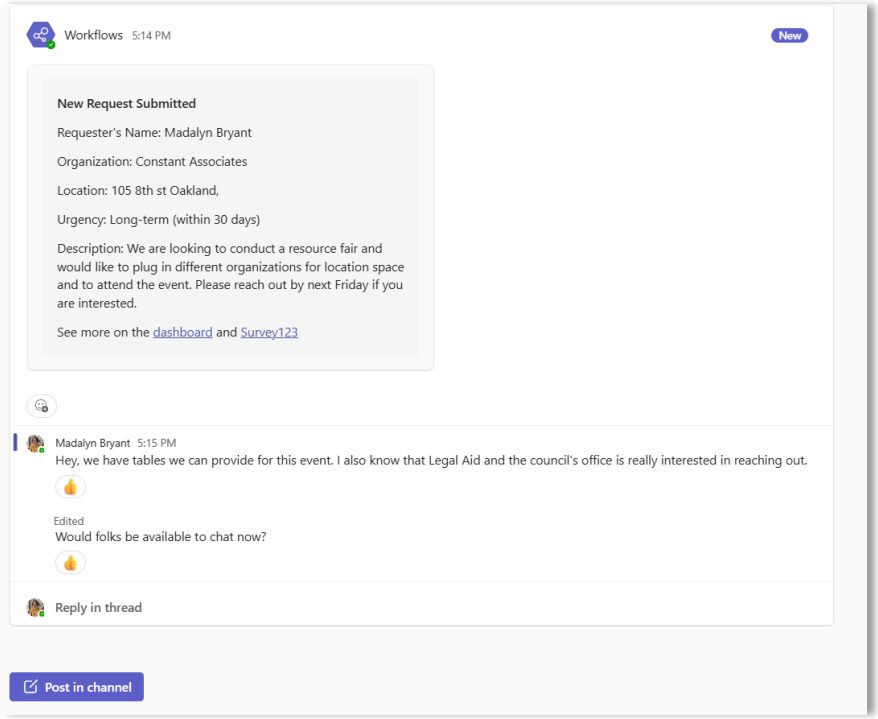

Image 1 Request Survey Post and Discussion

Teams Challenges and Solutions

Here's a table summarizing the key challenges and solutions:

Challenge	Solution
Granting outside users access to Teams, including partners and community members.	Enabled guest access and used Microsoft Entra B2B collaboration to invite external users. Provided clear instructions for completing membership requests and ensured guests were assigned appropriate roles.
Ensuring secure collaboration with external users while maintaining organizational protections.	Implemented cross-tenant access controls in Microsoft Entra, restricted guest invitations to trusted domains, and regularly reviewed guest memberships and permissions.
Connecting enterprise accounts from other organizations for seamless collaboration.	Used Microsoft Entra to manage external identities and enable single sign-on for enterprise accounts, allowing outside users to access Teams resources securely.
Setting up two-factor authentication (2FA) for new users, especially guests.	Provided step-by-step guidance for configuring multifactor authentication during onboarding. Offered troubleshooting support for common issues, such as lost authenticator devices or code delivery failures.
External users experiencing login or authentication errors.	Developed troubleshooting resources for common access issues, including verifying email addresses, clearing cached credentials, and contacting IT support for persistent problems.
Managing permissions and roles for external users to prevent unauthorized access.	Established clear role definitions (Owner, Member, Guest) and limited sensitive content to private channels. Regularly audited access and updated roles as needed.
Onboarding delays due to manual approval and technical setup.	Streamlined the onboarding process with automated request forms and clear communication between administrators and new users.

Survey123

Survey123 is a user-friendly, web-based tool from Esri that enables organizations to design and deploy custom surveys for data collection and needs assessment. It is being used with this platform because it allows communities and partners to quickly gather, organize, and analyze critical information, such as organizational capabilities and recovery service requests, in a standardized, accessible format. Integrating Survey123 with the platform ensures that data is collected efficiently, responses are easy to manage, and results can be visualized and acted upon in real time.

How-To Guides and Resources

- ArcGIS Survey123 Resources Hub
  - The central portal for all Survey123 resources, including tutorials, documentation, videos, and community support.
  - ArcGIS Survey123 Resources | Tutorials, Documentation, Videos & More
- Get Started with ArcGIS Survey123 (Official Tutorial)
  - A hands-on, beginner-friendly tutorial for creating, publishing, and analyzing surveys.
  - Get started with ArcGIS Survey123 | Documentation
- Survey123 Quick Reference Guide
  - Step-by-step instructions for using the Survey123 field app, managing surveys, and troubleshooting.
  - Quick reference—ArcGIS Survey123 | Documentation
- ArcGIS Survey123 Video Tutorials (Esri YouTube Playlist)
  - Official Esri videos covering everything from basics to advanced features.
  - ArcGIS Survey123 - YouTube Playlist

Sample Surveys

Through the alpha and beta testing stages, we created three main surveys to help achieve the platform's goals. The following sections include embedded XLSForm files of these surveys, which can be imported into Survey123 using the Survey123 Connect App. Below is a step-by-step guide for importing the XLSForm. Note: The member survey was created using Microsoft Forms a link is provided to duplicate.

Import Guide

- Extract the embedded XLSForm
  - Save the sample survey's Excel file (XLSForm) from the Blueprint to your local machine. If the survey includes images or files, place those assets in a /media subfolder next to the XLSForm (Survey 123 Connect expects a standard XLSForm + media structure).
  - To open the embedded file: Right Click>Object>Open.
- Launch Survey123 Connect and sign in
  - Open Survey123 Connect and sign in with your ArcGIS Online organizational account (Publisher/Admin role).

- Create a survey from the Excel file
  - Click New Survey → choose Create from file, then browse to your XLSForm.
  - Survey123 Connect will generate a local survey project and show a live preview of your form. Use Refresh in Connect whenever you modify the XLSForm to re-render the form.
- Review and adjust
  - In Connect's preview, page through the questions, verify required fields, relevancy (conditional visibility), choice lists, and maps.
  - If you see warnings, open the XLSForm and fix them (e.g., missing choice names, invalid types). Use the Connect preview to confirm fixes.
- Publish to ArcGIS Online
  - Click Publish in Connect. This creates the hosted feature layer(s) and item(s) for your survey in ArcGIS Online.
  - After publishing, open the Survey123 website to manage sharing (organization/public), view data, and configure reports.
- Share the survey
  - From the Survey123 website, set Share survey (public, organization, or groups), and—if public—limit submitters to Only add new records to protect responses.
- Embed and connect to the Platform
  - Copy the survey link and embed it in your Teams channel tabs.
  - Connect the survey's hosted layer to your ArcGIS Dashboard for real-time visualization. (See Dashboard setup section)

Resource Request

Collects information about specific recovery needs from communities, such as requests for services, supplies, or support. This survey ensures that needs are documented and routed to the right partners for action.

Resource Request Schema.xlsx

To open the embedded file: Right Click>Object>Open.

Capabilities

Gathers details about the skills, resources, and services that participating organizations can offer during recovery operations. This enables the platform to match available capabilities with community needs, improving coordination and resource allocation.

Capabilities Survey Schema.xlsx

To open the embedded file: Right Click>Object>Open.

Member Request

Note: The member request survey was developed in Microsoft Forms.

Captures requests from organizations or individuals seeking to join the platform or participate in recovery coordination. This helps administrators manage access and onboard new partners efficiently.

This survey can be duplicated by using the following link: Membership Request Form

Survey Challenges and Solutions

Challenge	Solution
Combining capabilities and requests into a single survey made the survey too long and overwhelming for respondents.	Separated the surveys into distinct forms—one for organizational capabilities and another for recovery service requests—to streamline the process and improve data quality.
Difficulty in pulling multi-select data into dashboards for analysis and visualization.	Limited the number of multi-select options or used single-select grids where possible; leveraged Power Automate and descriptive fields to facilitate dashboard integration.
Survey responses not appearing promptly on the dashboard due to data sync delays between Survey123 and ArcGIS.	Advised users to allow time for data sync and provided troubleshooting steps for administrators to verify integration and resolve issues quickly.
Some required fields and conditional logic led to submission errors or confusion for respondents.	Incorporated clear instructions, visibility rules for conditional questions, and regular testing to ensure required fields were intuitive and error-free.
Onboarding new users and managing access requests efficiently.	Developed a dedicated member request survey in Microsoft Forms, allowing quick review and approval of access requests to streamline onboarding.

ArcGIS Mapping and Dashboards

ArcGIS maps represent information spatially, from the simplest of visualizations to complicated analysis. This information along with Survey 123 can be summarized in interactive, real-time dashboards.

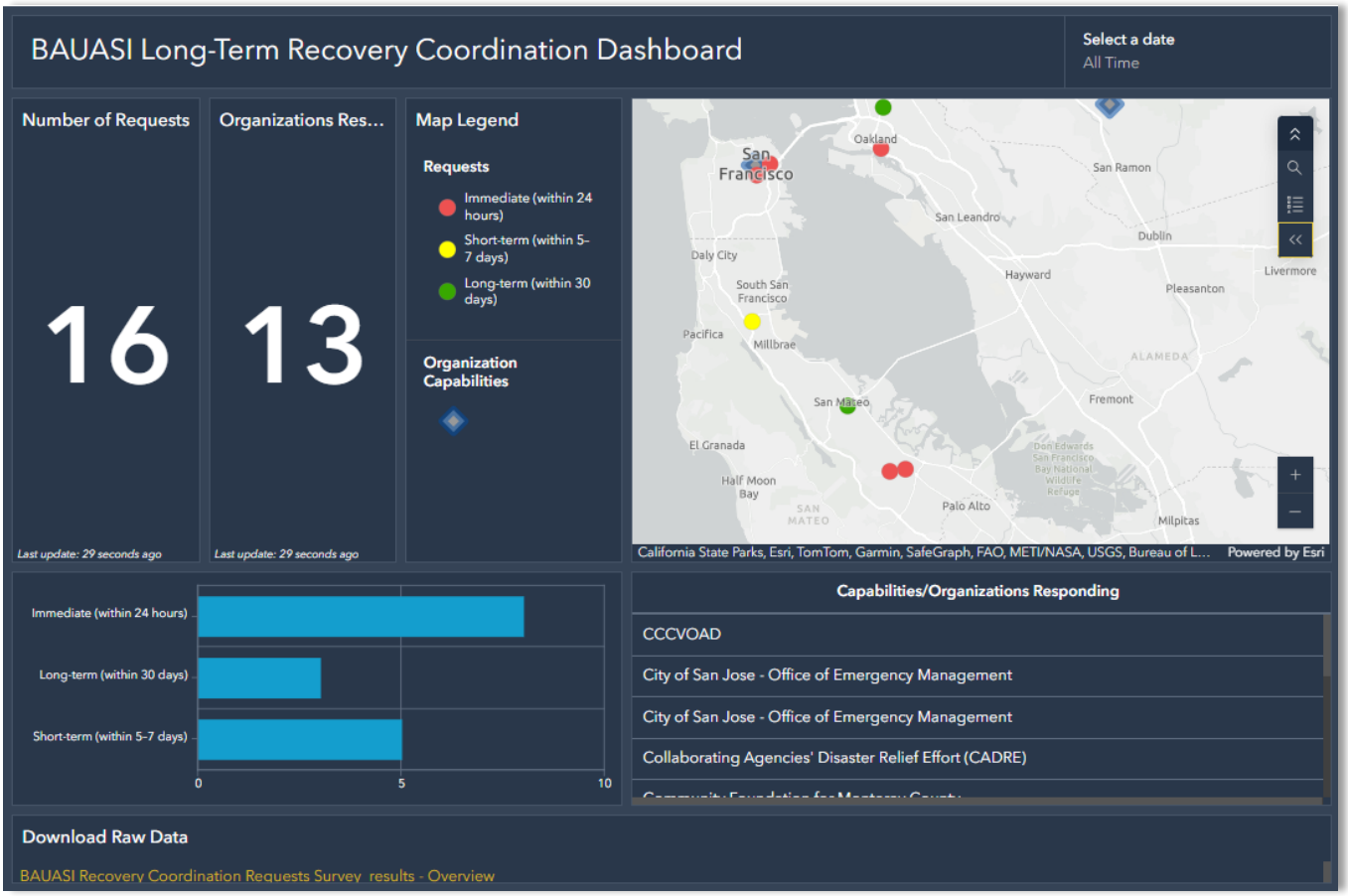

Image 3: Beta Platform Dashboard

How-To Guides and Resources

- Creating a Map using Survey 123
  - This web link provides an introduction to creating maps in ArcGIS with live information from Survey 123.
  - Creating a Map using Survey 123
- Introduction to 'Layers' in ArcGIS
  - ESRI hosts in depth guides and information, from the basic to complicated solutions in their forums. One piece of information if you're new to ArcGIS that will be useful to understand is layers. Within this section, there is also information about symbology, in other words, how those layers are represented.
  - Layers—ArcGIS Pro | Documentation

- ArcGIS Dashboards Resources Hub
  - The central portal for ArcGIS Dashboards resources, including tutorials, documentation, videos, and community support.
  - ArcGIS Dashboards Resources | Tutorials, Documentation, Videos & More
- Get Started with ArcGIS Dashboards (Official Documentation)
  - A beginner-friendly guide introducing dashboards, their purpose, and how to create and configure them for desktop and mobile views.
  - Create your first dashboard using ArcGIS Dashboards
- Using Selectors in ArcGIS dashboards
  - Selectors allow users to filter data as a viewer of an ArcGIS dashboard.
  - Use selectors—ArcGIS Dashboards | Documentation
- Multiselect and single select data in ArcGIS dashboards
  - Representing and filtering category information in ArcGIS dashboards is more complicated than you might expect. For more information about deciding between single select and multi select data, and for thinking about how to visualize both in an ArcGIS dashboard, see this thread.
  - Using Survey123 multiple select data in a dashboard

Mapping

- Create a map with both survey 123 records in ArcGIS.
  - Open one of the Survey 123 records in ArcGIS map viewer and save a ‘feature layer’.
  - Open the second Survey 123 record in ArcGIS and save another ‘feature layer’.
  - Add both layers to one map.
- Edit the basemap to meet your preferences.
  - The example uses a light grey canvas basemap.
- Edit the appearance of the two surveys within the map.
  - Edit the ‘symbology’ either through entering styles menu or the properties menu for the two layers.
  - Within properties, you can select whether or not to show each symbol in the map legend and the corresponding information.
  - Within styles menu, make sure to adjust the appearance for both layers through the selection menu at the top of the screen.
  - In the example map:
    - Requests are styled as ‘Types (Unique Symbols)’ by ‘Field:’ “What is the level of urgency for your request.”
    - Organizations that have filled out the organizational capabilities are styled with a Single Symbol.’
    - The symbols for both surveys are active in the legend.

- Enable pop ups and edit the pop up with the relevant information you would like to appear in the map. Preview the pop-up and click OK to save.
  - In the example map, the title was: {field/organization_name} with 11 key fields included from the 43 variables in the survey.
- Save the map
  - Click Save → Save As (if creating a new version) or save to update the existing map.
  - Add a descriptive title and tags for easy discovery.

Dashboard

- Create a dashboard.
  - Add a clear title and a summary to explain the map.
  - You may want to add the summary as a pop up as well, to provide information about the map to people accessing the map within Microsoft Teams.
- Add the map to the dashboard.
  - Click Add Element → Map.
  - Select the web map you created earlier.
  - Review the settings and features for any additional changes you would like to make.
  - In the example map, search bar' and 'zoom in/out' were selected but the rest of the tools were not enabled.
  - Next, Add Element → Map Legend.
- Add indicators to provide high level findings in a visual format.
  - Click Add Element → Indicator.
  - Choose the same data source as your map.
  - Configure these to highlight key information about the map.
    - For instance, the example map used a 'Statistic' (count) for the 'Field' (Object ID) for both surveys.
  - Make sure to edit the 'General' tab of the indicator with a title, such as Number of Requests.
- Add a chart to provide a quick look at the status of data in the map/surveys.
  - The example dashboard used a serial chart for the Requests Survey for 'Grouped value,' 'Category field' (What is the level of urgency for your request), 'Statistic' (Count), 'Field' (Object ID).
- Add a table or list to help simplify people access and sort information within the map without having to zoom or navigate the page.
  - The example dashboard used a 'List' pulling information from the Capabilities Survey. The list template was {field/organization_name} and icon was not included. Under actions, show pop-up was selected to open the respective pop-up for any organization in the map.
- Add links to the survey data to allow participants to access and sort the information in Excel.
  - Add a text element with a title indicating downloading raw data. Add a description of the data and a link to the feature layer's 'Export Data' option in ArcGIS online (or in Survey 123).

- Adjust design elements:
  - Under the view tab, add a header to your dashboard.
  - Select a theme to design the dashboard and ensure readability.
    - The example map used a custom theme with font 'Avenir Next' and BA UASI's colors, as a variation of the 'Dark' theme.
  - You may want to add the summary as a pop up as well, to provide information about the map to people accessing the map within Microsoft Teams.
- Add filter capabilities to the information in the dashboard using the 'Selector' tool.
  - The example dashboard had a filter with two defined options in a dropdown list to filter by the date of a completed Request Survey. This triggered an 'Action' to filter all items representing information from the Request Survey.
- Save and Share
  - Click Save.
  - Use Share to set visibility (Organization, Groups, or Public).
  - Copy the dashboard link to embed it within the Microsoft Teams page.

Challenges and Solutions

Challenge	Solution
Too much data available to the viewer.	Added a time filter for requests to allow users to view a smaller section of time if the administrator has not yet had time to update data for resolved requests.
The dashboard may not show the latest responses to the surveys if the page is not refreshed.	Encouraged participants to refresh the page before referencing the dashboard.
Need to understand when requests may be relevant without following the dashboard regularly.	Microsoft Teams provides the solution for this with multiple notification methods, which can be tied to the Survey 123 responses through Power Automate.
Multi-select responses from Survey 123 are stored as one response for survey entry, disrupting simple analysis in an ArcGIS dashboard.	Replaced multi-select grid with a single-select grid. Also added an option for qualitative descriptions of requests and services to simplify the pop ups for individual organizations within a map from the original category descriptions. It would also be useful for future efforts using a multi-select grid to have less available options

Troubleshooting References

Microsoft Teams

- Create a team from scratch in Microsoft Teams: Step-by-step instructions for team setup, privacy, and inviting members.
- Teams for Nonprofit organizations - Microsoft Teams: Templates and onboarding guidance for nonprofits.
- Introduction to Setting Up Public or Private Teams in Microsoft Teams: Guide for managing team settings and permissions.

Power Automate

- Power Automate: Official Microsoft documentation for troubleshooting flows, connectors, and integrations.
- Adaptive Card with Survey123 Example (GitHub): Example code and setup for automating notifications between Survey123 and Teams.

Survey123

- ArcGIS Survey123 Resources: Tutorials, documentation, videos, and community support.
- Get started with ArcGIS Survey123: Beginner-friendly guide for creating, publishing, and troubleshooting surveys.
- Quick reference—ArcGIS Survey123 Documentation: Step-by-step instructions and troubleshooting tips.

ArcGIS & Dashboards

- ArcGIS Dashboards Resources: Tutorials, documentation, and community support for dashboards.
- Create your first dashboard using ArcGIS Dashboards: Guide for dashboard setup and troubleshooting.
- Using Survey123 multiple select data in a dashboard: Tips for handling multi-select data in dashboards.

SharePoint

- SharePoint Support: Official Microsoft support for troubleshooting site setup, permissions, and integrations.