Crisis Planning Starter Kit

Free Resource from Mission-Driven Momentum Podcast

Practical templates and frameworks for building a crisis response plan that protects your mission, your people, and your organization's future.

CRISIS PLANNING ESSENTIALS

Crisis Response Team	3-5 people who can make decisions quickly with backup contacts
Scenario Planning	Top 5 most likely crises with specific response steps
Communication Protocol	Designated spokesperson and message frameworks
Critical Operations	The 72-hour test: what you need to keep operating

CRISIS RESPONSE TEAM TEMPLATE

Your crisis response team should be 3-5 people who can make decisions quickly. Include backup contacts for each role in case the primary person is unavailable or is the one in crisis.

Primary Team Members

Team Leader (usually Executive Director)

Name: _____

Role: _____

Cell Phone: _____

Personal Email: _____

Backup Person: _____

Board Representative (usually Board Chair)

Name: _____

Cell Phone: _____

Personal Email: _____

Backup Person: _____

Operations Lead

Name: _____

Role: _____

Cell Phone: _____

Personal Email: _____

Backup Person: _____

Communications Lead

Name: _____

Role: _____

Cell Phone: _____

Personal Email: _____

Backup Person: _____

Additional Team Member (Optional)

Name: _____

Role: _____

Cell Phone: _____

Personal Email: _____

Backup Person: _____

VULNERABILITY ASSESSMENT

Identify your organization's specific vulnerabilities before a crisis hits. Be honest about these; this assessment is for internal planning only.

Financial Vulnerabilities

☐ More than 40% of budget from a single funder

☐ Less than 3 months of operating reserves

☐ Major grants or contracts expiring within 6 months

☐ No backup plan if largest revenue source disappears

Notes: _____

Leadership Vulnerabilities

☐ Only one person knows critical passwords/accounts

☐ No identified interim leader if ED is unavailable

☐ Key relationships exist only in one person's network

☐ No documented procedures for critical processes

Notes: _____

Operational Vulnerabilities

☐ Critical data stored on only one computer

☐ No cloud or off-site backup of important files

☐ Building/facility has known safety or maintenance issues

☐ No alternative location if primary space is unavailable

Notes: _____

Reputational Vulnerabilities

☐ No designated spokesperson for media inquiries

☐ Social media accounts managed without clear policies

☐ Unaddressed complaints or tensions that could escalate

☐ No Google alerts or monitoring for organization mentions

Notes: _____

Technology/Cybersecurity Vulnerabilities

☐ Staff have not received cybersecurity training

☐ Two-factor authentication not enabled on critical accounts

☐ Weak or shared passwords used for important systems

☐ No plan for responding to a data breach

Notes: _____

Priority Action: Review this assessment and identify your top 3 vulnerabilities to address first. Even fixing one vulnerability significantly improves your crisis readiness.

SCENARIO PLANNING FRAMEWORK

Create a response plan for your top 5 most likely crisis scenarios. Be specific about actions, not general about intentions. Complete one worksheet for each scenario.

Scenario Planning Worksheet

Scenario Name: _____

(Be specific: "Executive Director Sudden Resignation" not "Leadership Crisis")

Likelihood: ☐ High ☐ Medium ☐ Low

Potential Impact: ☐ Severe ☐ Significant ☐ Moderate

First Hour Response:

1. _____
2. _____
3. _____

First 24 Hours:

1. _____
2. _____
3. _____
4. _____

Who Must Be Notified:

☐ Board Chair / Board Members

☐ Staff Team

☐ Major Funders

☐ Key Partners

☐ Clients/Participants

☐ Media (if applicable)

Other: _____

Key Decisions Required:

1. _____
2. _____
3. _____

Resources Needed:

_____

Sample Completed Scenario: Executive Director Sudden Resignation

First Hour Response:

1. Board Chair notified immediately
2. Secure access to critical accounts (change passwords if needed)
3. Identify interim point person for urgent decisions

First 24 Hours:

4. Board Chair convenes emergency board meeting
5. Identify interim leadership (internal or external)
6. Draft staff communication
7. Draft stakeholder communication
8. Schedule full board meeting within one week
9. Brief interim leader on immediate priorities

Key Decisions Required:

10. Who serves as interim ED?
11. What is the timeline for permanent search?
12. What stakeholder communications are needed?

COMMUNICATION PROTOCOL

Designate one official spokesperson and establish clear protocols before a crisis hits. Mixed messages from multiple sources cause confusion and damage trust.

Designated Spokesperson

Primary Spokesperson: _____

Backup Spokesperson: _____

All external inquiries should be referred to this person.

Message Framework Template

Adapt this framework for your specific situation. Having the structure ready means you can respond in hours instead of days.

"We are aware of [situation]. We take this seriously. We are currently [investigating/taking action/working to resolve]. We will provide updates as we learn more. For questions, please contact [designated person]."

Social Media Response Protocol

Who has authority to pause scheduled posts? _____

Who monitors comments during crisis? _____

Target response time for acknowledgment: _____ hours (recommend 2 hours)

Internal Communication Checklist

☐ Staff notified before external announcement

☐ Clear talking points provided to staff

☐ Staff instructed to refer inquiries to spokesperson

☐ Board members briefed on situation and messaging

☐ Daily check-ins scheduled during active crisis

THE 72-HOUR TEST

If your building burned down right now, what would you need to keep operating for 72 hours? This is your critical operations list. Document where each item is stored and who has access.

Critical Information Checklist

Financial Access

☐ Bank account login credentials

Location: _____

☐ Accounting software access

Location: _____

☐ Payroll system access

Location: _____

Critical Documents

☐ Insurance policies and contact numbers

Location: _____

☐ Contracts and agreements

Location: _____

☐ Organizational bylaws and policies

Location: _____

Contact Information

☐ Staff emergency contact list

Location: _____

☐ Board member contact list

Location: _____

☐ Key donor/funder contact list

Location: _____

☐ Client/participant contact information

Location: _____

Technology Access

☐ Password manager or master password list

Location: _____

☐ Email/communication platform access

Location: _____

☐ Website and social media login credentials

Location: _____

☐ Donor database/CRM access

Location: _____

Critical Rule: More than one person must know where to find this information. If only your ED knows the passwords and your ED is the crisis, you're stuck.

TABLETOP EXERCISE GUIDE

Practice your crisis plan by walking through scenarios with your response team. You'll discover gaps you never thought of. Schedule these exercises at least annually.

How to Run a Tabletop Exercise

Duration: 60-90 minutes

Participants: Crisis response team members

Materials: Your crisis plan, scenario worksheet, note-taking materials

Exercise Structure:

13. **Present the scenario (5 min):** "It's Monday morning. We just learned that..." Read the crisis scenario aloud.
14. **Individual response (5 min):** Each person writes down their immediate actions and questions.
15. **Group walkthrough (30-40 min):** Step through the first hour, then first 24 hours. Who does what? In what order?
16. **Identify gaps (15 min):** What questions came up that you couldn't answer? What information was missing?
17. **Update the plan (10 min):** Assign action items to address gaps discovered.

Sample Scenarios to Practice

18. Your largest funder just called to say they won't be renewing their grant, effective immediately.
19. A staff member's social media post about a client has gone viral and people are angry.
20. Your executive director was in an accident and will be out for at least three months.
21. You arrived at work to find your office flooded overnight.
22. A board member discovers financial irregularities in the organization's records.
23. A staff member reports that they clicked on a suspicious email link and can't access their files.

Debrief Questions

☐ Did everyone know their role?

☐ Were response steps clear and actionable?

☐ Did we have the information we needed?

☐ Were communication protocols clear?

☐ What would we do differently in a real crisis?

☐ What gaps do we need to address?

TEAM CARE DURING CRISIS

Crises are stressful. The way you care for your team during a crisis affects their long-term trust and commitment. Build support for the human side into your response plan.

Daily Check-In Framework

During active crisis response, schedule brief daily check-ins with your team. Keep them to 15-20 minutes.

Check-In Questions:

24. How are you holding up? (genuine question, not pleasantry)
25. What do you need from me or from the team?
26. What's working? What's not working?
27. Is your workload sustainable for the next 24 hours?

Support Resources

Document resources available to staff before you need them:

Employee Assistance Program (EAP): _____

Mental Health Hotline: _____

Local Counseling Resources: _____

Post-Crisis Debrief

After the immediate crisis passes, schedule a team debrief to process the experience and capture lessons learned.

☐ What went well in our response?
☐ What would we do differently?
☐ What gaps in our plan did we discover?
☐ How did our communication work?
☐ How is everyone feeling now?
☐ What updates do we need to make to our crisis plan?

ANNUAL REVIEW CHECKLIST

Review and update your crisis plan at minimum annually, and whenever something major changes in your organization. Use this checklist to ensure your plan stays current.

- ☐ Crisis response team contact information is current
- ☐ Backup contacts are identified and current
- ☐ Scenario plans reflect current organizational structure
- ☐ Communication protocols reflect current roles
- ☐ Critical operations list is complete and locations verified
- ☐ Cloud backups are functioning and accessible
- ☐ Insurance policies are current and adequate
- ☐ Tabletop exercise scheduled or completed this year
- ☐ New vulnerabilities assessed (funding changes, staff changes, etc.)
- ☐ Lessons from any actual incidents incorporated

Last Review Date: _____

Reviewed By: _____

Next Review Date: _____

NEED MORE SUPPORT?

Podcast: Listen to Episode 8 at missiondrivenpod.com

Blog: Read the companion post for deeper examples and stories

Consulting: Need help building a crisis plan tailored to your organization? Contact The Scanland Group at contact@thescanlandgroup.com or visit thescanlandgroup.com

From The Scanland Group:

Keep leading with heart, keep showing up with purpose,

and keep creating a world where everyone belongs.