

Toolkit 1- Organisational Response Plan

The [Charity Excellence Framework \(CEF\) platform](#) enables any UK based non-profit to increase its impact and financial resources, but is very quick and simple to use. [Demo video](#) (4 mins). **Everything is free.**

The other toolkits below, can be downloaded from the [Charity Excellence Framework Home Page](#).

Responding To The Crisis

- Financial assessment and action plan.
- COVID19 Funder List, 250+, with links to other lists: 1000+ in total.

Sustainability

- Building resilience & creating a fundraising recovery plan. [Video Version](#).
- Financial sustainability assessment and action plan.

If you want the Charity Excellence daily updates, connect with me on [LinkedIn](#), [Twitter](#), or [Face Book](#).

Planning Checklist & Resources

Healthcare and other expert advice can only come from professionals, and I'm not, so additional resources are included at the bottom of this article.

The checklist is not intended to be doom mongering; we have enough of that already. Not everything will apply to everyone, some might, but may not be important to you and, hopefully, most will not be needed.

Prepare, but don't panic. This checklist is intended to help you identify the issues you wish to consider, in order to help you minimise any impact and reassure everyone that you have adequate planning in place.

But, before you begin, we all need cheering up. Try the [Guardian's Happy Thread](#) - the penguins are great.

People

Beneficiaries

- Risk assess the possible impact on vulnerable beneficiaries, who may be more at risk than the general public or, conversely, may require additional support.

- The Government guidance on social or community care, educational settings and residential, supported living and home care is in the Resources section at the bottom.
- Here's a useful guide from the BBC on [remaining in virtual contact](#) with older people.
- People and funding are already in short supply, but potentially setting up a Face Book chat group or calls to the most vulnerable may help to provide some reassurance and alleviate isolation.
- And the virus will last for many months. Consider moving more online to maintain engagement with your beneficiaries and other stakeholders, using software such as [Mission Box Engagement Communities](#).

Specialist Requirements

- Ensure you are aware of any additional requirements, such as in education, social or community care, residential, supported living and home care. Links to resources below.

Staff and Volunteers

- Review your HR procedures, such as home working and absence. Here's some [advice from BWB](#), with more on their [coronavirus hub](#). If you need HR help, contact [Cranfield Trust HR Net](#). Here's a guide on tools for [managing people remotely](#) and the [HSE guidance](#) on H&SW for home workers.
- We all need to stay connected and support each other. Help others and yourself by joining relevant charity social media groups - here's the [CEF resource list of 50+](#).
- The Government has announced [sick pay for those self-isolating](#) will be paid from day 1, instead of day 4. And that health and social care volunteers will be given [additional employment safeguards](#) so they can temporarily volunteer in the event of a widespread pandemic.
- Volunteers in many charities can be older people in the at risk group. Take that into account in planning, consider if they might be able to help in ways that are less risky (telephone calls to vulnerable beneficiaries?) and, they may well be isolated themselves, so don't forget them.

Planning & Contact Lists

- Ensure that your [contingency plan](#) and emergency contact list are up-to-date.

Travel, Meeting & Event Schedules

- Review travel, meetings and events that are planned, and consider contingency options that may be needed.
- Board Meetings. For board meetings check your constitution allows remote participation (such as by phone or video link) and quorum.
- AGMs. If you have an AGM coming up, consider encouraging members to vote by proxy.
- Overseas. For foreign travel, check the [FCO website](#). The [Travel Health Pro website](#) might also be useful.

Ad Hoc Volunteer Groups

One welcome development has been the emergence of ad hoc groups of people who are working to support those affected by the virus.

This is a real opportunity for charities, but also comes with risks. Such groups may not be properly organised, or managed and those who pose a risk to our vulnerable beneficiaries haven't gone away. Carrying out volunteer and DBS checks, if applicable, simply may not be possible in the current crisis.

Options. The best option might be to bring such volunteers under the management of your charity to benefit from your expertise and existing procedures. That may not be possible, or they may not be willing to. Other options might include working with these groups in some way, or providing support and advice to help them work more effectively on their own.

Risk Assessment. Whatever you might choose to do, carry out an assessment of the risks. Questions you might ask include. How credible are those running the group and what organisational, or other relevant expertise do they have? How well organised and managed is the group? What activities are they undertaking? How vulnerable are the beneficiaries? A more extensive Ad Hoc Group Risk Assessment template has been uploaded into the CEF.

In light of that, what support could you provide to help them mitigate risks and achieve more? Should you work with them and, if so, how might you best do that?

Fundraising and Income

- **Impact on Income.** About 45% of total income is from the public, with small and very large charities the most reliant on this. The immediate impact is likely to be on street and Door-To-Door collections and/or fundraising events. If you have retail shops, visitor attractions or deliver other paid-for services, consider the financial impact of any potential disruption. The IoF has published [guidance on the potential impact](#) and how fundraisers are responding and also [advice for events fundraisers](#).
- **Funder Responses.** I chair a local grant making company and, whilst, I'll need to get my board's approval, I would be more than happy to increase our grant funding and expand the focus of what we fund. At least some of the community foundations are launching emergency appeals, as are others. Many of the major grant makers have committed to standing by us. It's not good, but it's not all bleak news.
- **Emergency Funding.** The Charity Excellence list of 100s of COVID19 funders can be downloaded from the home page.
- **Digital.** [Online fundraising](#) is likely to become much more important. Here's the [CEF Digital Fundraising Insight Report](#) on the sector that will give you a checklist of possible opportunities. All indicators are currently amber. That is the majority of charities report that they are not doing these well.
- Make sure yours is working well and, if you're new to this, here's [how to get started](#). Consider [setting up an online shop](#) - here's [how to set up a charity E Bay shop](#). Here's the CEF list of [70+ fundraising platforms](#), with links to 5 under Auction/Sell. Think

about [virtual events](#). Consider [text donations](#) - here are the [best text donation services](#). Or [contactless](#).

- You can find lots more coronavirus articles on this Charity Digital [website page](#).
- **Online Giving - Website.** Online giving has been increasing year-on-year and will continue to do so, particularly in light of the Coronavirus. The CEF assesses 6 aspects of website effectiveness and the Charity Excellence Data store has all of them at amber. That is the majority of charities are not doing these well. Reviewing your website could be an easy win for you. If you're a member of the CEF community, run 'website' in the query system and it'll give you an assessment of your website and links to the resources you need. If not, This [Charity Excellence Sector Insight Briefing](#) will give you the questions to ask.
- **Google Non Profits.** Register for G Suite - cloud programmes for office administration, including Gmail, Google Documents, Spreadsheets, Calendar, Presentations, Forms/Surveys, Calendar, Chat, Drive (a cloud file storage system) and Sites. And premium access to You Tube.
- **Grant Funding.** Check how critical funding bids, or grant payments might be, in case of possible delays in these being processed. But some good news is this [welcome, positive response](#) from grant makers.
- Hopefully additional funding will become available but, if not, there may be other ways in which you could ask your funders could help you. Maybe, allowing you to divert funding from cancelled services to what you're doing instead, converting restricted funding to core or, at least, delaying reporting deadlines.
- To try and help, 2 new Charity Excellence funder lists have been created, with links to funder websites - 60+ [health](#) and 90+ [social welfare](#). There are also existing funder lists for [hospices](#), and those working with [older people](#) and the [disabled](#), plus funders that support [smaller charities](#), [hard to fund causes](#) and [core funding](#) applications.
- **Other Guidance.** Here's the [IoF guidance for fundraisers](#) and events advice from the [Fundraising Regulator](#). [Blue Frog](#) have produced appeal and thank you letter templates for hospices and arts charities.

Finance & Resources

Financial Management

- Download Toolkit 5 from the [Charity Excellence website](#) to carry out a financial assessment and create an action plan, with links to additional information and resources.

Scams

- Sadly, it had to happen. There are reports of fraudulent sellers of face masks and coronavirus-themed phishing emails. People are understandably worried and panic buying has made some resources scarce. However, don't let those pressures blind your common sense. You may wish to alert vulnerable beneficiaries. Details of the scams can be found [here](#).

Contracts & Service Provision

- Consider the potential for disruption to services you deliver, or that others deliver to you. Including any Force Majeure or similar clauses in contracts.
- I'm not a lawyer, but force majeure is essentially any unexpected circumstances outside of a contracting party's reasonable control that, having arisen, prevent it from performing its contractual obligations.

Insurance

- The Government has made coronavirus a “notifiable disease”, which is required by many insurance policies. Check if you're covered.
- If not, you could consider buying cover extension, but it's likely to be very expensive.
- Does your insurance cover people when home working, or require specific checks to be carried out, before they do, or require you to advise them of any home workers?

Communications

- Keep everyone up-to-date on what to do to reduce risk of exposure in the workplace. Include your volunteers in your communications planning. Here's [charity coronavirus comms advice](#) from Charity Digital.
- Want to exploit digital, but confused by all the options? Here's the [Digital Maturity Frameworks Overview](#) – 57 digital tools, sortable by category etc.
- Ensure any closure, or restriction in availability, is communicated to everyone, particularly beneficiaries. If using automated social media posting, make sure that you've amended/deleted any posts that are now out-of-date or no longer appropriate, such as delayed/cancelled events.

Other Areas

Hygiene Arrangements

Ensure adequate arrangements are in place, both on a day-to-day basis and in the event you may need to deep clean.

Legal

Here's a [coronavirus legal FAQs](#) page from Stone King, including fundraising and events. Need help? Go to the CEF [free goods and services page](#) and scroll down to Legal.

[Employment implication](#) for charities.

IT Systems

- Do you have adequate access to conference or video calling, for remote meetings and home working. Has any software been set-up and do participants know how to use it. Need help with that? Contact [CITA](#) or [WCIT](#). Need hardware or software? Go to the CEF [free goods and services page](#) and scroll down to IT and Software.
- Before buying workspace collaboration/meeting software, check what's available free for charities. I like [Zoom](#), but there are others, such as [Slack](#). In response to the coronavirus outbreak, Asana is offering charities [free licences to its work](#) management tool. Here's a guide to holding [online meetings](#).
- For home workers, check their broadband is strong enough and they have adequate anti-malware, such as an up-to-date virus checker and firewall. Consider using a [Virtual Private Network](#) (VPN).
- Here's the [Coronavirus Tech Handbook](#).

Begin To Think Ahead

Toolkits 6 and 7 will give you everything you need to begin to build your resilience, assess your financial sustainability and create your fundraising recovery plan. Download them [here](#).

Regulatory Advice

- [Charity Commission](#) - AGMs/key meetings, remote meetings, reporting.
- [Fundraising Regulator](#) - person-to-person, direct marketing, events.
- [CCNI](#) - Annual reporting, charity registration, meetings, advice/queries.
- [OSCR](#) - AGM, events, virtual meetings, governing document, charity purposes, reporting.
- [Health & Safety Executive](#)

Resources

- [Coronavirus Tech Handbook](#) - Civil Society section, links to lots of resources.
- [Latest information and advice](#).
- [Acas: Advice for employees and employers](#).
- [Acas: Homeworking guidance, including checklist and policy template](#)
- [Gov.UK: Guidance for employers](#).
- [Gov.UK: Social or community care and residential settings](#).
- [Gov.UK: Educational settings](#).
- [Gov.UK - Residential care, supported living and home care](#)
- [Gov.UK: Decontamination in non-healthcare settings](#).
- [NHS: Fit for travel advice](#).

If you thought this was useful, why not register with the [Charity Excellence Framework](#)? It has the largest resource base in the UK charity sector and everything is free.