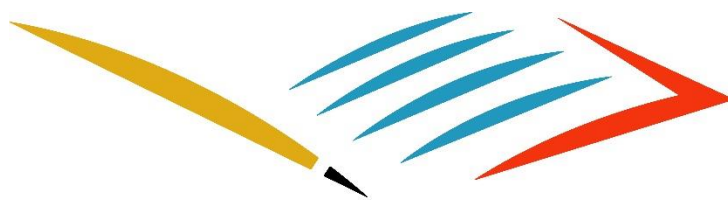


CRISIS MANAGEMENT PLANNING GUIDE



A Planning Tool for Literacy Organizations



Literacy Quebec



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Summary

If there is one thing the COVID-19 pandemic has taught us, it is that we must be prepared for unforeseen situations and pivot in response. While no organization wants to deal with a crisis, unpredictable circumstances are almost inevitable. All organizations will, at some point, face crisis situations. While some of these may be minor, others can have serious and long-lasting impacts.

Putting a plan in place to help prevent, address and navigate through crisis situations is the best solution for any organization to better prepare for such circumstances when they do occur.

Literacy Quebec developed this **Crisis Management Planning Guide** to support its member organizations in their own development and implementation of a crisis management plan. While each plan should be developed and tailored according to each organization's needs, there are common elements that should be considered in all plans.

This guide will address:

- How to use the planning tool;
- What is crisis management;
- What does the planning process look like;
- How to develop a plan;
- Different types of emergency situations;
- Actions to be taken and procedures to follow in these situations;
- Communications during a crisis; and
- Recovery after a crisis.

Literacy Quebec also developed a **Crisis Management Planning Tool Kit** to accompany this guide in order to facilitate planning and implementation using a step by step process.

How to Use This Planning Guide

The purpose of this guide is to provide back-up information and explanations on the different elements of a crisis management plan.

As mentioned in the Summary section, a tool kit has also been developed to accompany this planning guide and to steer you through the creation of a personalized plan for your organization.



This symbol can be found throughout the guide and indicates that a ready to use template, table, checklist or other tool exists in the accompanying tool kit. You can choose to fill them out manually in the tool kit, or you can fill them out using the electronic versions. Time estimates to complete certain steps are included in the guide to provide a general idea for planning purposes.

Please also note that a **Crisis Management Reference Document** has been created listing several different resources pertaining to crisis management, including:

- Resources related specifically to pandemic preparedness and response;
- Models, templates and examples of crisis management plans;
- Articles and webinars;
- Crisis communication planning;
- General resources; and
- In-depth resources.

You can consult the Reference Document for additional sources of information that may be of specific interest to you and your organization.

What is Crisis Management?

According to the Canadian Centre for Occupational Health and Safety (CCOHS), “An emergency is any situation or occurrence of a serious nature, developing suddenly and unexpectedly, and demanding immediate action.” There are several types of emergency situations that could potentially occur in any workplace setting, including:

- Medical emergencies (injuries, heart attack, strokes, choking, falling)
- Natural disasters (snow and ice storms, flooding, tornadoes, earthquakes)
- Fires and explosions
- Violent acts (suspicious packages, intruders, burglaries, hostages)
- Health-related (pandemic, outbreaks, illness)
- Technology-related (losing data, hackers, viruses)
- Human resources (departures, retirements, terminations, worker shortages)

Emergency situations can have serious consequences on any organization. This is why it is important to consider which potential crisis could happen and how the organization will respond and address it. This is what defines a crisis management plan.

When developing a crisis management plan, it is important to:

- Identify what the potential emergency situations could be for your organization;
- Establish procedures to be followed for each emergency situation;
- Ensure that the entire team is aware of these procedures; and
- Evaluate the plan regularly to ensure it meets objectives.

Steps to Develop a Crisis Management Plan

The CCOHS has identified key steps in developing an emergency response plan. While these steps have informed us in the development of this guide, we have opted for a simplified model with a process that is more closely aligned to the realities of smaller community literacy organizations.

The following steps will be covered in this guide and in the tool kit:

- 1. Establishing the planning process.**
- 2. Assessing the risks and capabilities of the organization.**
- 3. Developing the plan.**
- 4. Implementing the plan.**
- 5. Evaluating and improving the plan.**

Step 1: Establishing the Planning Process

While the process of developing a crisis management plan may seem like an overwhelming task, the objective is to start, one step at a time.

You will need to consider who should be involved, as well as which process is the most appropriate for your organization in developing your plan.

Who Should Be Involved in Developing the Plan

While some organizations may prefer to have one person develop the entire plan, it is highly recommended that a few people be involved. This will not only ensure that different perspectives and scenarios are taken into consideration, but it will also increase buy-in from the entire team so that the plan is put into action.

Even if most literacy organizations in Quebec are quite small, individuals from different parts of the organization can be involved. In addition to staff, you could also include:

- Board members
- Volunteers
- External sources (for example, a fire department or other specialists)

Which Planning Process Is Right for Your Organization

It is important to keep in mind that there are several ways of developing a plan and what works for one organization may not be feasible for another. Many circumstances will influence how you develop your plan, including:

- Size of the organization and number of staff;
- Location of the organization (for example, some are housed in schools and already have certain emergency procedures to follow); and
- Circumstances and priorities for each organization (for example, some emergency situations may be of higher priority than others).

The following are suggestions and scenarios that you could consider for your organization's planning process:

1. Organize a one-day retreat or planning day with your team.

In this scenario, you may need to prioritize which elements are most important for your organization to make sure you finish the day with a general plan containing specific actions. Completion of the more detailed elements of the plan could be divided among the team and a follow-up meeting organized to pull all sections together.

2. Establish a committee responsible for developing the plan.

Create a committee of a few people and hold a series of meetings to tackle the plan, one section at a time. Each committee member could be responsible for specific sections of the plan. This scenario may take longer, but will eventually lead to a more detailed plan.

3. Assign sections or specific tasks within the plan to different team members.

This scenario allows each person to take responsibility for certain elements or tasks within the plan. These could be assigned according to expertise, skills, experience, or function within the organization.

4. Develop the plan by addressing the sections that are most pertinent and of greatest priority for your organization.

Review this planning guide to familiarize yourself with the contents and determine which elements of a crisis management plan are of highest priority for your organization.



Identify who will be involved in developing the plan and which planning process is most appropriate for your organization: pp. 4-5. Time estimate: 30 minutes.

REMEMBER:

The most important part is starting the plan, even if you prioritize and do one section at a time. Try to involve a few members of your team to get different perspectives and to ensure everyone within the organization is committed to carrying out the plan.

Creating a Crisis Management Policy

Developing a crisis management policy demonstrates the organization’s commitment to the safety and security of its team, as well as to the maintenance and continuity of operations.

The crisis management policy must be approved by administration and the Board of Directors and communicated to the entire team.

The following is intended as a model and was inspired by *An OSH Program in Your Workplace, Ottawa: Human Resources Development Canada, 1994*:

<p>Date</p> <p style="text-align: center;">Crisis Management Policy</p> <p>(Insert name of organization) prioritizes the health, safety and security of all its staff, volunteers, clients and any other person who associates with the organization. The Board of Directors and administration are committed to developing, instilling and promoting various regulations and practices in order to ensure this.</p> <p>More specifically, we adhere to the following:</p> <ol style="list-style-type: none"> 1. The Board of Directors and administration are responsible for ensuring that appropriate training is provided to all individuals requiring it, as it pertains specifically to the Crisis Management Plan, its implementation and its application. 2. All employees and other individuals within the organization for whom it may be applicable must be presented with the Crisis Management Policy. 3. All employees and other individuals within the organization for whom it may be applicable will be held accountable for following the Crisis Management Plan. 	
<p>_____</p> <p>President Name of organization</p>	<p>_____</p> <p>Executive Director Name of organization</p>



Use the model crisis management policy in the tool kit and adapt it to your needs: p. 6. Time estimate: 30 minutes.

Step 2: Assess Potential Emergencies and Organizational Capacity

The second step in creating a crisis management plan involves assessing possible risks, hazards and emergencies for your organization, determining the likelihood of these happening, and what the potential consequences would be.

Performing risk assessment evaluations can be complex processes for some organizations and businesses, therefore, for the purposes of smaller literacy organizations, we have simplified this task. Should you require more elaborate risk assessments, we suggest you refer to the CCOHS's *Emergency Response Planning Guide*, which is listed in the Bibliography and the Reference Document.

Organization Checklist and Diagram



Use the checklist in the tool kit to identify key areas and items that are applicable for your organization: p. 7. Time estimate: 60 minutes for both.

Use the diagram in the tool kit to draw a rough configuration of your space and locate the items checked off on the above checklist: p. 8.

Possible Emergencies



Use the corresponding Potential Emergency Checklist in the tool kit to identify any emergencies that could impact your organization: p. 9. Time estimate: 60 minutes.

When reviewing these possible emergencies, it is also important to evaluate the consequences of these should they occur and worst-case scenarios.

Keep in mind that while we think many of these situations could never happen to our organization, it is better to consider the possibilities, even if the likelihood is quite low.

Determining the Organization's Capacities

After you've identified potential emergencies, consider your organization's preparedness and capacity to face these possible emergencies.

Some questions that may be helpful are the following:

- Are fire extinguishers on hand?
- Are there back-up systems to protect equipment, information, etc.?
- Do you have an inventory of equipment?

- Do you have staff trained in administering first aid?
- Do you have evacuation plans?
- Has your team been trained in evacuation procedures?
- Do the appropriate people know how to work alarm systems?
- Do staff know how to shut down certain equipment?
- Do you have reminders and processes for the regular checking and maintenance of certain equipment and supplies, such as fire extinguishers and first aid?

Resources

What are the resources you'll need including training, equipment and supplies to respond to these potential emergency situations? Do these currently exist in your organization?

Your plan should make reference to procedures for inventory control, inspection and testing of equipment, supplies and resources, as well as training. Also explain at what frequency this will happen and who will be responsible.

Make sure to include:

- First aid supplies;
- First aid training;
- Fire extinguishers;
- Fire alarms;
- Easy grab emergency preparedness kit; and
- Possibly other items that are relevant for your organization.



Fill in the table in the tool kit identifying training, equipment and supplies needed for different emergencies: p. 12. Time estimate: 60 minutes.

Lists

Another aspect of preparedness involves keeping and maintaining various types of lists that will be important to have in case of possible emergencies, including:

- Staff and volunteer contact information;
- Computer equipment;
- Passwords and login information;
- Suppliers and service providers with contact information;
- Special instructions (e.g., alarms, equipment, processes, etc.); and
- Possibly other lists that are relevant for your organization.



Fill in the table in the tool kit identifying various lists you may need in an emergency situation: p. 14. Time estimate: 30 minutes.

Protection of Records

Identify all important organizational records, such as:

- Employee records;
- Client records;
- Supplier records;
- Financial information; and
- Possibly other records that are important for your organization.

Important records can be stored on site in fire-proof safes if possible and identified on the site diagram. Create duplicates and keep records off-site or use secure cloud services.

Every department in your organization must identify which important records are kept to ensure precautions are taken.



Use the Important Records Checklist in the tool kit to identify important records and their location: p. 15. Time estimate: 30 minutes.

Step 3: Develop the Crisis Management Plan

Objectives

The main objectives of the crisis management plan are to:

- Identify potential emergency situations;
- Identify the response for each of these;
- Establish internal and external communications systems; and
- Ensure the safety and security of everyone.



Use the tool kit to identify specific objectives for your crisis management plan: p. 16. Time estimate: 30 minutes.

Emergency Response Team

It will be necessary to identify all people in your organization who will have roles and responsibilities pertaining to responding in an emergency situation. You may have different types of roles depending on the situation at hand and the severity.

You will also need to consider back-up plans for vacations, sick days, travel, etc.



Using the following descriptions as a guide, identify your Emergency Response Team in the tool kit: pp. 16-17. Time estimate: 60 minutes.

Emergency Response Manager (usually the Executive Director)



The Emergency Response Manager has the overall responsibility for the handling of the emergency situation. This person calls out the emergency situation and declares when it is over.

- Responsible for the overall response to an emergency.
- Determine the severity of the situation: minor, serious, major.
- Authorize evacuation when needed.

- Point of contact for internal and external communications and release of information.
- Provide appropriate notifications to interested parties.
- Record details of the emergency and fill out the Incident Report Form if applicable.
- Communicate with other members of the response team.
- Request assistance from other resources when required.

Emergency Response Leader



The Emergency Response Leader leads the response procedures in an emergency. There should be more than one Emergency Response Leader to ensure coverage at all times and in all situations (for example, one for first aid, one for evacuations, etc.).

- Act as back-up Emergency Response Manager when this position is not on site or able to perform functions.
- Evaluate the emergency situation, identify needs and put emergency response measures into action.
- Make recommendations to Emergency Response Manager, including for evacuations.
- Record details of the emergency situation and assist with the completion of the Incident Report Form if applicable.
- Maintain communication with the Emergency Response Manager.
- Brief emergency responders arriving on the scene.

Communications Officer



While this role is often carried out by the Executive Director, organizations that have a person responsible for communications may want to assign this role accordingly.

- Provide appropriate information internally and externally, including the media and public.
- Respond to requests for information and organize interviews if applicable.
- Record details of the emergency situation during the event.
- Remain in contact with the Manager and Leader.
- Maintain media contact lists.
- Identify appropriate spokespeople to provide specific information.
- Obtain approval from the Emergency Response Manager for the release of all information.

Activating Responses

Alarms

Your organization may already have different alarm systems in place, such as a security alarm, fire and smoke detectors, or others that will automatically alert people. If alarms do not go off automatically, depending on the emergency situation, the person responsible from the response team will need to alert employees and all other persons on site (for example, by pulling an alarm in case of fire and calling 911).

In some situations, for example a power outage, the alarm system may not be functional and telephone lines may be down. In these instances, it is important to have a contingency plan, such as the use of cell phones or alerting neighbouring businesses and passersby for a call to be made to 911.



Fill in the information related to alarms in the tool kit: pp. 17-18. Time estimate: 60 minutes.

Reporting

The standard procedure for most emergencies will be to contact 911. If there are special circumstances in your organization, make sure to post these near every telephone (for example, in some offices it is necessary to dial 9 to get an outside line).

Procedures:

- Dial 911.
- Request police, fire or ambulance.
- State location and address.
- Explain the situation.
- Remain on line if safe to do so.



Identify procedures for reporting an emergency in the tool kit: p. 19. Time estimate: 15 minutes.

Developing Your Organization's Response Procedures

When developing your specific emergency response procedures for your crisis management plan, make sure to take the following elements into consideration:

- Be specific, clear and brief with your procedures;
- Mention roles and responsibilities of the response team, as well as what is expected of employees;
- Mention under which circumstances 911 is to be called; and
- Indicate under which circumstances the office would be evacuated and shut down.

Important Considerations in Developing Your Response Procedures

Consider the following questions and implement the information in your plan:

- Who should give the evacuation order and how will it be communicated?
- Who will have the responsibility of checking that all areas have been evacuated?
- Do you have a buddy system for employees, visitors, etc. who have a disability?
- Have you created visual evacuation routes and posted these in prominent areas?
- Are there special steps that need to be taken, such as locking confidential records or if money is kept on the premises?
- What could possibly require an emergency shutdown in your space?
- Where will everyone meet after they have been evacuated?
- Who will take attendance to ensure everyone is out?

Reminder of potential emergency situations that could be applicable to your organization and that could require a specific response procedure:

- Natural disasters;
- Weather-related;
- Fires and explosions;
- Power;
- Hazardous material;
- Technology-related (virus, hackers, loss of data, etc.);
- Intruders and violent acts;
- Suspicious packages;
- Bomb threats;
- Emergency shutdown;
- Sabotage/Vandalism;

- Workplace Violence;
- Succession planning;
- Pandemic; and
- Other possible emergency situations.

IMPORTANT:


Emergency situations are specific to each organization and so are the emergency responses. While the following table provides guidelines for some emergency response procedures to more common situations, you will need to evaluate your own possible emergencies and the procedures that accompany each of these.




Response Procedures to Specific Emergencies









Crisis Management Tool Kit Reference: pp. 20-24. Time estimate: between 60 and 120 minutes.



The following emergency response procedures are included to provide a general idea of what to do for more common scenarios. You can use these response procedures for your plan; however, it is important to keep in mind that each of these may be different for every organization. You will need to adapt each response to the emergency situations that you identified for your organization.

	Emergency	Response Team/ Responsibility	Response Procedure
	Fires and explosions		<ul style="list-style-type: none"> → As soon as alarm sounds, trigger additional alarms and ensure everyone follows established evacuation procedures. → Make sure everyone goes to safety zone/meeting place. → Call 911. → Person responsible will ensure everyone accounted for. → Only put out small fires with an extinguisher on site if training was provided and if the following criteria apply: <ul style="list-style-type: none"> ○ the fire alarm is activated. ○ the building is being evacuated. ○ 911 was called. ○ the fire is small, contained and not spreading. ○ there is an exit nearby and it is clear. ○ you can avoid smoke inhalation. ○ if these criteria are not met, evacuate immediately. → A trial will be conducted once per year.

	Emergency	Response Team/ Responsibility	Response Procedure
	Medical emergency	Person responsible for first aid	<ul style="list-style-type: none"> → The designated first aid respondent (must be certified) will evaluate and administer first aid. → Request assistance from others and call 911 if necessary. → An Incident Report will be filled out.
	Weather-related and natural disasters (floods, snow storms, ice storms, tornadoes, earthquakes, etc.)		<ul style="list-style-type: none"> → Retrieve easy to grab emergency preparedness supply kit. → Stay informed about warnings. → Determine if appropriate to close the office. → Determine if appropriate to shut off valves: water, gas, electricity, etc. → Unplug electrical equipment. → Evacuate if unsafe or told to do so. → In case of flooding, elevate equipment if possible. Use sandbags near openings.
	Suspicious packages		<ul style="list-style-type: none"> → See signs of suspicious package in Guide on p. 24 → If possible, place in a plastic bag or container. If not, cover the item with clothing, paper, a garbage can, etc. → Do not shake, empty, manipulate the contents. → Leave the room where the item is located, close the door and prevent people from entering. → Wash your hands to prevent contamination. → Call 911. → Make a note of all people in the office when the package arrived. → In case of spill: <ul style="list-style-type: none"> ○ Follow above procedures, but do not manipulate item. Cover it. Do not clean spill. ○ Turn off fans or ventilation system. ○ Remove contaminated clothes. Put in a plastic bag/container. ○ Shower with soap and water ASAP and do not use chlorine or other disinfectants.

	Emergency	Response Team/ Responsibility	Response Procedure
	Bomb threats		<p>The following steps should be followed for a bomb threat (CCOHS):</p> <p>Threat made by telephone:</p> <ul style="list-style-type: none"> → See factors to consider in Guide on p. 24 → All threats must be taken seriously. → Remain calm and courteous. → Listen carefully to the person. → Try to get information (who, what, where, when, why and how). → Try to keep the person on the line by asking questions, or getting them to repeat the information. → Take note of any characteristics in the person's voice or any other noises you may hear. → Use a prearranged signal to have another person call 911 while keeping the person on the line and not interrupting them. → Use the Sample Bomb Threat Report Form in the tool kit to record as much information as possible. <p>Follow evacuation procedures, including:</p> <ul style="list-style-type: none"> → Unlocking cabinets for authorities and identify strange or suspicious packages, but do not touch them. Report to authorities. → Taking personal belongings like a purse. <p>Use Bomb Threat Report Form in tool kit.</p>
	Power failure		<p>Many situations can trigger a power failure, often involving extreme weather conditions. Try to determine the cause.</p> <ul style="list-style-type: none"> → Retrieve easy to grab emergency preparedness supply kit. → Stay informed about warnings. → Determine if appropriate to close the office. → Determine if appropriate to shut off valves, such as water and gas. → Unplug electrical equipment. → Evacuate if unsafe or told to do so.

	Emergency	Response Team/ Responsibility	Response Procedure
	Evacuation procedures		<p>See p. 25 of this Guide for tips and actions</p> <ul style="list-style-type: none"> → Remind everyone to remain calm. → Give precise instructions on what employees and clients must do. → Direct employees and clients to use designated fire exits. → Make sure to have designated person check washrooms and other areas. → Meet in designated meeting areas.
	Emergency shutdown		<p>See p. 25 of this Guide for tips and actions</p> <p>Emergency shutdowns of certain systems are usually as a result of another emergency.</p> <p>When going through another emergency, determine if the shutdown of one of your systems is required, including:</p> <ul style="list-style-type: none"> → ventilation systems, gas, water electricity, etc.; → operating equipment; → equipment to be left unattended; and → equipment not working due to power failure.
	Sabotage/Vandalism		<p>See p. 26 of this Guide for tips and actions.</p>
	Technology-related (Resulting from emergencies or unrelated, such as data loss, hacking, malware, viruses).		<p>See p. 26 of this Guide for tips and actions.</p> <p>Use checklist in tool kit.</p> <p>Use Borrower Agreement template in tool kit.</p>

	Emergency	Response Team/ Responsibility	Response Procedure
	Pandemic planning		Consult pandemic planning section on p. 28 Use Pandemic Immediate Closure Preparedness Checklist in tool kit.
	Succession planning		Consult succession planning section on p. 30
OTHER			
OTHER			

Suspicious Packages



The following are signs and characteristics of suspicious packages (CCOHS):

- Excessive postage;
- Handwritten or poorly typed addresses;
- Incorrect titles;
- Title, but no name;
- Misspellings of common words;
- Oily stains, discolourations or odour;
- No return address;
- Excessive weight;
- Lopsided or uneven envelope;
- Protruding wires or aluminum foil;
- Excessive security material such as masking tape, string, etc.;
- Visual distractions;
- Ticking sound;
- Restrictive endorsements, such as “personal” or “confidential”; and
- Postmark that does not match the return address.

Bomb Threats



According to the CCOHS, there are certain factors to consider when receiving a bomb threat and the appropriate level of response such as the severity, known internal issues with employees or others, previous threats made, and threats that may have been made to other organizations similar to yours or in your area.



Bomb threats should always be taken seriously. Use the CCOHS sample template in the tool kit for this type of emergency situation: pp. 25-26.

Emergency Evacuation Procedures



There are a number of reasons why evacuations may be necessary, depending on the emergency situation.

The CCOHS provides several useful tips for evacuations:

- Test fire alarms, fire extinguishers and smoke detectors regularly.
- Inspect fire exits: signs must be visible and illuminated, make sure there are no obstructions.
- Designate a person (and an alternate) who will decide when to evacuate.
- Designate staff who will notify others to evacuate and decide how this will be communicated to everyone.
- Designate a person who will make sure everyone is evacuated and who will check washrooms, offices, hallways and possibly other less visible areas.
- Create evacuation routes and post this information in prominent locations.
- Lock away valuables and confidential materials.
- Establish a “buddy” system to assist with the evacuation of employees or visitors with disabilities.
- Shut off specific equipment (depending on the type of emergency).
- Determine where everyone will meet once they have left the building.
- Establish procedures for taking attendance of all individuals who were in the organization.
- Prepare staff in advance for possible evacuations and procedures.
- Train all employees in evacuation procedures and practise your plan.

Emergency Shutdown



For several emergency procedures, a shutdown of certain systems will be required, especially if they are directly related to the emergency, contribute to the emergency, increase dangerous consequences from the emergency, or could harm first responders.

The type of equipment that could require shutdown includes:

- Ventilation systems, gas, water electricity, etc.;
- Operating equipment;
- Equipment that will be left unattended; and
- Equipment not working due to power failure.

Sabotage and Vandalism



Sabotage is the act of destroying or damaging something deliberately so that it does not work correctly. Any organization could potentially face this situation.

This is why it is important to limit access to office areas that are not necessary for employees, clients, visitors, etc. In addition, certain areas and cabinets should remain locked at all times and access made available only to those who require it. Other ways to ensure protection include having a visitor log book, escorting visitors when necessary and restricting access to certain locations.

When an employee is terminated, several procedures should take place, including escorting the employee from the building, as well as retrieving keys and pass cards. It is also important for all acts of vandalism and sabotage to be reported to supervisors and when issues of security are involved, report to the police.

Technology-Related Procedures



Technology-related emergency situations could occur as a consequence or fallout from another crisis, especially if there is damage, loss or an office closure. Procedures need to be put in place for lending equipment, working remotely using technology, and accessing servers and files.

Technology-related issues may also happen as a result of circumstances unrelated to an emergency situation. For example, as more and more organizations and functions are going digital, the threat of potential technology-related crisis situations could increase. This includes everything from data loss and breaches, viruses, malware and hacking, just to name a few.

It is important for all organizations to put basic systems and processes in place to limit these types of hazards as much as possible and to be prepared if they do occur.

Consider the following questions:

- Which data in your organization needs to be protected?
- Who has access to what information?
- How easy is it to access this information?

- What could happen if an unauthorized person has access to this information?
- What happens if you lose this information?
- Do you have virus protection and firewalls?
- How often do you update your software, operating systems, applications, etc.?
- Do you use secure internet connections?
- Do you regularly erase your internet browsing history?
- Do you use two-factor authentication for certain services?
- Do you use strong passwords (numbers, special characters, upper and lower case letters) and change them often?
- Are you careful with USB keys and external hard drives?

For some organizations, it may be worthwhile to seek help from technology specialists who can provide expertise and solutions specific to your needs and usage.



Use the Technology Assessment Checklist in the tool kit: pp. 27-28. Time estimate: 60 to 90 minutes.



A Borrower Agreement template, inspired by *We're All in this Together: Best Practices in Adult Literacy Program Delivery During the COVID-19 Pandemic 2021*, Quill Learning Network, is provided in the tool kit for the lending of technology: p. 29.

Other Emergencies for Consideration in Your Plan

While the potential emergency situations covered to this point can be incorporated into your Crisis Management Plan, there are two additional emergencies that should also be considered that are much more extensive: pandemic planning and succession planning. Both of these could require the development of their own individual plans, especially to address processes and procedures from a service delivery perspective.

For the purposes of this Crisis Management Guide, the next section presents general information to take into consideration and guidelines to follow from a more immediate and administrative point of view, as opposed to a service delivery perspective. In other words, the following are immediate priorities to put into place to respond to these two types of emergencies.

IMPORTANT:

You will also find several resources in the Reference Document that can assist you should your organization require more detailed information to help you develop a more extensive pandemic plan and succession plan.

Pandemic Planning



The COVID-19 Pandemic has taught most organizations and businesses about the importance of being prepared for unforeseen situations. We have learned extensively about several facets of our operations and we've adapted to many scenarios by putting processes and procedures in place.

These will greatly help us adapt not only to future outbreaks, but also to other types of emergency situations.

As mentioned earlier, a pandemic plan may warrant a document of its own, but it is still important to include some of your main processes and procedures in your Crisis Management Plan.

While several of the elements covered in the Crisis Management Plan are applicable in responding to a pandemic, other unique factors have come to light and should be considered in your plan. They include:

- Remote work;
- Technology;
- Data, management, storage and security;
- Personal protective equipment;
- Control and prevention measures;
- Mental health; and
- Solutions for service delivery.

Some key considerations and questions are:

- Are staff properly equipped with necessary tools to work from home? This includes computers, software programs, phones, internet access, etc.
- Do staff need specific training to do their work remotely?
- What will happen if staff get sick or a family member needs to stay at home?
- How will you stay connected with staff and conduct meetings?
- How will you check in on everyone's well-being and mental health?
- How will you communicate your office status to clients and other stakeholders?
- Can you collaborate with other partners and resources in your sector or outside?
- How will you ensure the security and confidentiality of certain data?
- Can organizational files be accessed, stored and shared remotely?
- How will calls at the office and messages be retrieved? How can these be redirected to the appropriate person?
- How will you retrieve mail? Can it be redirected?
- Does your insurance need to be notified, are changes in your policy required?
- How will you address elements surrounding volunteers?
- How will you address elements surrounding fundraising?
- How will you address elements related to communications (website, social media, public and media relations, etc.)?
- Do you have the appropriate personal protective equipment and proper procedures/protocols in place to welcome staff, clients and service users to your site? Is everyone clear on how to follow and enforce these?



A checklist developed by Literacy South Central in their document **Being Prepared for the Unexpected - A Pandemic Planning Manual for Small Nonprofits** is helpful in identifying preparedness in case of directives for an immediate closure by public health authorities. This checklist is included in the tool kit: pp. 30-31.

Guides to assist you with in-depth pandemic planning:

- ***Being Prepared for the Unexpected - A Pandemic Planning Manual for Small Nonprofits***, Literacy Link South Central.
- ***We're All in this Together: Best Practices in Adult Literacy Program Delivery During the COVID-19 Pandemic 2021***, Quill Learning Network.

Consult the Reference Document for more information.

Succession Planning



No organization is immune to labour shortages, retirements, employee illness and other circumstances impacting human resources. This is why succession planning is taken into consideration in a crisis management plan.

Would your organization be able to function if someone in a key role suddenly became ill or if an unexpected death occurred? What if your Executive Director was planning retirement? Does your organization have a plan in place to address these scenarios?

Just like a crisis management plan, a succession plan's objective is to put procedures and processes in place to ensure minimal disruption and continuation of activities.

According to *Succession Planning for Literacy and Basic Skills Agencies and Networks*, produced by Literacy South Central (2012), a long-term approach to succession planning takes the following factors into consideration:

- Efforts should be made on long-term talent development;
- Developing talent for key positions needs to be incorporated;
- Developing talent not only for current, but also future needs (the plan looks 3-5 years ahead);
- Candidates are evaluated systematically based on different perspectives and sources of information;
- Planning is integrated with other human resources activities;
- Talent is developed within the organization; and
- Planning is done on a continuous basis.

When organizations define their needs, they can also identify gaps and put the appropriate action plan in place to address these.

Key considerations to incorporate in your crisis management plan:

- What projects are employees working on at the moment?
- What are the deadlines for these projects?
- Who are each employee's main contacts? This could include suppliers, partners, collaborators, etc.
- Do you have up-to-date job descriptions for all positions?
- Do you have readily available lists of staff, board members, volunteers, clients, suppliers, service providers, etc.?

- Do you have the most up-to-date planning documents for your organization, including a business plan, strategic plan, fundraising plan, crisis management plan, succession plan, etc.?
- Do you have passwords and access to all necessary information for your organization, including computers, telephones, applications, programs, etc.?
- Do you have an agenda or schedule with important dates for the organization (this could be monthly and annual events, activities, meetings, etc.)?
- Are you familiar with all banking, financial, accounting and payroll information?
- Do you have contact information for important services like accounting and auditing?
- Do you know where your most recent annual report and audited financial statements are?
- Where are important documents housed in your organization, such as contracts, policies, procedures, just to name a few?
- Are you familiar with the technical and functional workings of certain equipment in the office?
- Who performs repairs and servicing for equipment?
- Do you know how the security system works?
- Do you know where certain shutoff valves and electrical panels are located?

If your organization already has a succession plan in place, consider adding key elements and procedures in your Crisis Management Plan. If your organization does not yet have a succession plan, you can consult *“Succession Planning for Literacy and Basic Skills Agencies and Networks,”* produced by Literacy South Central (2012), a step-by-step guide that will assist you in developing one.

Providing Victim Support

Experiencing any crisis or emergency situation can deeply affect individuals, including victims, the response team, employees, visitors, and possibly others. Organizations should familiarize themselves with existing support services and resources and offer these to anyone impacted by emergency situations.



Use the table in the tool kit to identify victim support resources in your area: p. 32. Time estimate: 30 minutes.

Notifications and Reporting

Depending on the emergency situation, it may be necessary to report the incident to specific agencies and in some cases, it is required by law. This can include:

- Municipal, provincial and federal authorities;
- Fire department;
- Police and Sûreté du Québec;
- Ambulance;
- Poison Control Centre;
- Hydro-Québec;
- Natural gas or propane suppliers;
- Management and board members; and
- Insurance companies.



Use the table in the tool kit to list agencies that need to be contacted in your situation. Reporting is necessary for several reasons, including ensuring everyone's safety, for legal and for insurance purposes. Your plan should also indicate who will communicate with these various agencies and who will file reports: p. 33. Time estimate: 30 minutes.

In some emergency responses, you may also need to fill out an Incident Report Form. Your organization will need to decide which scenarios warrant filling out this form.



List the emergency situations that will require filling out an Incident Report Form. Use the Incident Report Form in the tool kit if needed: pp. 33-34. Time estimate: 15 minutes.

Internal and External Communications

Communications are an extremely important component of your Crisis Management Plan. This includes internal and external communications, during and after an emergency.

Appropriate communications need to take place with staff, board members, volunteers, clients, services users, stakeholders, suppliers, collaborators, partners and possibly the larger community.

While we often communicate by telephone using a landline in an emergency, these can sometimes be disrupted in some emergency situations. Other ways to communicate, include: cellular phones, PA systems (if present in your organization), two-way radios, or sending a person to a public or neighbouring phone.

Other means of communication, depending on the emergency situation and the severity, include: text messages, social media, putting information on internal networks, emails, private social media groups, etc.



In the tool kit, indicate the prioritized method of internal communication and what to do if it is unavailable: p. 35. Time estimate: 30 minutes.

Communications with the Public:

There may be emergency situations where it will be necessary to communicate with the media and the general public.

To ensure accurate, consistent and precise information is communicated, it is important to identify a spokesperson for your organization. Employees should be given the instruction of always referring media to the spokesperson. Consider offering media training to your organization's designated spokesperson.

Remember that the names of those involved in an emergency situation should never be released until the family has been notified and the Emergency Response Manager has given approval.

You may also need to issue a press/media release, depending on the emergency situation.

When speaking with media, keep the following tips in mind:

- Use a spokesperson, but you may also want to use specialists to explain technical elements of an emergency situation;

- Focus on the facts about the emergency situation;
- Use simple language;
- Report on the nature of the incident;
- Explain what was done to address the situation;
- State the impact/consequences;
- Explain coordination and collaboration efforts; and
- Provide information concerning next steps.

After an emergency situation, it is important to closely monitor news stories about the incident. Check newspapers, radio, television, and social media to make sure only accurate information is distributed and that corrections are made should inaccurate statements be made.



**In the tool kit, indicate how you will communicate with the public:
p. 36. Time estimate: 30 minutes.**

Media Plan

A communication plan that incorporates a media plan is useful to ensure preparedness and response in an emergency situation.

Remember that an integral part of any communications and media plan is the establishment of key messages. These will be extremely useful to your organization in dealing with media, especially in a crisis situation.

Key messages must also make reference to your organization's Crisis Management Plan and what you have put into place to address emergency situations. For example:

“Our organization has developed and implemented a crisis management plan to prepare for potential emergencies. The safety and security of our employees and service users is our highest priority.”



Fill in the section in the tool kit concerning communications with the public and media: pp. 36-37. Time estimate: 30 minutes.

Recovery Plan

The main objective of the recovery plan is to resume activities, or at least a certain level of activity, as quickly as possible in a safe and efficient manner.

Other considerations for your recovery objectives include:

- Collaborating with another organization or business that could house staff in a temporary location;
- Creating remote work solutions (work from home);
- Putting in place tools and procedures for employees to access computer equipment, phones, electronic files, platforms and software programs, etc.; and
- Communicating as quickly as possible with key stakeholders and service users.

Some important questions that you need to consider:

- What if the emergency situation resulted in the organization's site being damaged, or losing equipment, files and important documents? How would you continue to deliver your services?
- What if the organization was impacted by hacking, a virus or server issues?
- What if employees were not able to return to work? Who would oversee their responsibilities and who has access to projects they were working on?

Steps:

1. What are the critical activities of the organization and how would these be impacted by an emergency situation?
2. What strategies and action plans can you put in place?



Fill in the table in the tool kit with your organization's critical activities: pp. 37-38. Time estimate: 60 to 90 minutes.

Incident Investigations

Depending on the type of emergency situation that occurred, an incident investigation may be necessary to identify the cause and how to prevent it. This may also be the case for insurance purposes.

Cleanup and Restoration Plan

After an incident investigation, clean-up and restoration activities can begin, if possible.

Consider specialty services and others who could assist after emergency situations in recovery efforts:

- Cleaning and disinfecting companies (water damage, mould control);
- Contractors, builders and renovators;
- Suppliers;
- Electronic data recovery;
- Storage facilities;
- Computer equipment; and
- Office space.

Don't forget that any damaged or used resources and supplies in the emergency situation (for example, fire extinguishers and first aid supplies) must be replaced.



Fill in the table in the tool kit with your contact information for cleanup and restoration: p. 39. Time estimate: 30 minutes.

Insurance and Claims Procedures

Make sure to include contact information about your insurance provider and policy numbers so they are readily accessible.

Include specific instructions and procedures for communicating with and submitting information to your insurance provider.



Insert your insurance information in the tool kit: p. 40. Time estimate: 30 minutes.

Step 4: Implement the Plan

After you have developed your Crisis Management Plan, the following step will be to implement it within your organization.

This component of the plan covers all forms of training necessary in order to respond to emergency situations, especially for those responsible for specific functions.



Use the training checklist in the tool kit to determine what kind of training will be required by your organization: p. 41. Time estimate: 30 minutes.

Training is not the sole responsibility of those carrying out specific tasks during an emergency. Ensure all staff understand and comply with emergency response procedures. Training will therefore also involve drills and exercises with the entire organization.

The crisis management plan will need to detail:

- What kinds of drills and exercises should be practised;
- Frequency of practices;
- Who is responsible and who should be involved;
- Evacuation procedures;
- Internal and external communications;
- Responses in case of fire;
- First-aid responses; and
- How to incorporate corrections into the plan after exercises.

There are three kinds of drills and exercises:

- Full-scale exercises (responding to a realistic scenario and involving outside resources, like your local police and fire departments);
- Functional drills (evacuations, fire drills, how to use a fire extinguisher); and
- Tabletop exercises (step-by-step evaluation of responses).

These exercises will then allow the team to properly evaluate the crisis management plan and the changes that need to be incorporated.



Use the template in the tool kit to identify the drills and exercises that should take place at your organization: p. 42. Time estimate: 30 minutes.

When developing these exercises, make sure to be as realistic as possible and adapt them to actual scenarios.

Make sure to notify your security company before practising these exercises if various types of alarms are used. Remember to advise the security company when the drill is over and reset the alarms.

Once you have completed the drills and exercises, it is important to review and consider the following questions in order to make adjustments to your response procedures:

- Overall, how did the drill or exercise go?
- Were there any significant delays, difficulties, challenges?
- Did the Emergency Response Team respond as planned?
- Were communications clear?
- Were difficulties experienced in evacuation procedures?
- Did everyone understand what they needed to do?
- What could be changed to simplify the plan and make it clearer?



Answer the evaluation questions in the tool kit after completing your drills and exercises: pp. 42-44. Time estimate: 60 minutes.

Step 5: Evaluate and Improve the Plan

After the drill and exercises, the members of the Emergency Response Team will need to formally meet to evaluate the exercises, the responses and the overall crisis management plan.

The team should look at whether or not the objectives were met, as well as consider possible challenges and improvements that need to be incorporated with appropriate action plans.

A few reminders:

- A Crisis Management Plan is a living document, meaning that it needs to be reviewed on a regular basis to ensure that it is continually meeting its objectives.
- Make changes as they arise and are needed; and
- Make sure to be realistic with your plan, in terms of goals and timelines.



Use the reminder checklist in the tool kit to verify various elements of the crisis management plan. You can review this list regularly to make sure the plan is up to date: pp. 45-46.



Use the Next Steps checklist to keep track of actions to be taken for your plan. As you go through the planning process, add any actionable items to this list. Also indicate who will follow through and the timeframe. The items listed in the tool kit are provided as an example, but you may need to add elements specific to your organization: pp. 47-49.

Public Organizations and Crisis Management Resources

Quebec

Ministère de la Sécurité publique

2525, boul. Laurier, 5th floor
Tour du Saint-Laurent
Sainte-Foy, QC G1V 2L2
Toll-free: 1-866-644-6826
Monday to Friday, 8:30am to 4:30pm
Fax: (418) 643-0275
E-mail: Infocom@msp.gouv.qc.ca
Web Site: www.msp.gouv.qc.ca/index_en.asp

Canada

Public Safety Canada

269 Laurier Avenue West
Ottawa, ON K1A 0P8
Phone: (613) 944-4875 (General Inquiries)
Toll-free: 1-800-830-3118
Fax: (613) 954-5186
E-mail: communications@ps.gc.ca
Web Site: www.publicsafety.gc.ca/

International

World Health Organization

Avenue Appia 20
1211 Geneva 27
Switzerland
Phone: (+00 41 22) 791 2111
Fax: (+00 41 22) 791 3111
Telex: 415 416
Telegraph: UNISANTE GENEVA
Web Site: www.who.int/en/



Emergency Management Glossary

For a bilingual, comprehensive list of crisis management terms and definitions, please consult [Terminology Bulletin 281](#) titled *Vocabulaire de la gestion des urgences - Emergency Management Vocabulary* published by the Translation Bureau. It is highly recommended that you print a copy of this essential glossary.

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