

Disaster Readiness and Response Checklist for Funders

A practical guide for preparing, responding and learning alongside your community

WHY THIS CHECKLIST EXISTS

Most philanthropic and community organizations are not inherently built for disaster response. Unless responding to emergencies is your core work, it can be difficult to know how to prepare for something that feels uncertain or far away.

Hurricane Helene's impact on Western North Carolina communities reinforced that disaster preparation is foundational to advancing community health and wellbeing and that the health and wellbeing of a community is foundational to disaster preparation. Dogwood Health Trust's ability to move quickly as a funder was grounded in strong relationships, clear communication, a commitment to equity and internal alignment. At the same time, the storm created new challenges while deepening others that communities across the region were already facing.

No response will ever be perfect. This checklist is meant to help you prepare, act with intention and learn as you go. It is a starting point to support your thinking and help guide decisions as you respond to the specific needs of your community.



Preparation

Before Disaster Strikes

Questions to consider

- ❓ If a disaster were to occur today, would we be prepared? What would our response look like?
- ❓ Would our grantmaking and community investments change at all as a result of a disaster? Would we expand our annual giving/payout? Would we change any of our funding strategies?
- ❓ How would our values and commitments to equity show up in our disaster response?
- ❓ What balance should investments strike between immediate relief, long-term recovery and resilience?
- ❓ In what ways would our organization be best positioned to contribute, whether through direct relief, coordination, advocacy or attracting additional resources?
- ❓ Do we want to create a grantmaking policy and process for disaster response? Should grant amount approval thresholds, decision-making structures or internal processes change to ensure efficiency?
- ❓ Who are our most trusted partners, and have we established the best methods of communication with them in an emergency situation?
- ❓ Do we have the relationships with leaders and organizations that could reach the communities most likely to be affected? How would we assess and aggregate community needs in real time?
- ❓ Do we have relationships with state and local emergency response leaders that we'd need in a disaster to ensure coordination?
- ❓ What gaps exist in our internal systems, communication, coordination or readiness?
- ❓ How are we preparing to support staff and partners during a crisis?

Checklist

Build and maintain strong relationships with leaders, organizations and networks across your community and region

Identify collaborators: state and local emergency operations contacts, funders, intermediaries and partners that will help you coordinate resources and responses equitably

Clarify and document roles and decision-making structures within your organization and, ideally, outside your organization

Identify leadership and communication responsibilities within your team(s) and organization

Establish communication channels for staff, board members, partners and public audiences, taking into consideration the languages spoken in your region

Ensure key operational systems, communication tools, financial systems, grantmaking records, contact lists and data are accessible, backed up and easy to retrieve during a disruption

Align on how your organizational values and strategic priorities will guide your disaster response

Learn the basics of federal disaster response systems so your organization and community can be positioned to access state and federal resources

Review existing disaster/resilience plans in your community and make investments that proactively strengthen community planning, resilience and infrastructure

Codify roles, communication structures and response processes into a disaster response plan that is regularly reviewed and shared with staff and leadership

Work with other local, regional and state funders to identify potential roles in a disaster or create a pre-disaster emergency response fund or reserve to support rapid deployment of resources

Establish how your organization will gather feedback, assess impact and learn throughout a disaster response and recovery effort

Immediate Response

First Few Days

Questions to consider

- What are we hearing right now, and how is it changing day by day?
- Who haven't we spoken to that we should to ensure resources reach those most affected?
- What assumptions do we need to revisit as new information becomes available?
- How are we coordinating with others to avoid gaps or duplication?
- What role can philanthropic relief response dollars play that public funding cannot?
- What is working well right now, and what is not?
- What are we learning in real time that should shape our next steps?

Checklist

Confirm the safety and availability of staff, board members and key partners

Identify a small internal team to begin coordinating relief response efforts

Convene leadership (including the board) quickly to align on priorities and how you'll approve actions

Contact partners directly, as possible, to understand urgent needs and assess their capacity to respond, distribute resources and support their communities

Establish clear communication protocols, including identifying primary points of contact for partners, staff and response coordination

PHASE 2

Assign internal liaisons and create regular structures for communication with local and state government, partners and other funders, such as recurring calls or meetings to share updates, aggregate needs and coordinate response efforts

Create a shared process and central place for gathering information, tracking emerging needs and synthesizing what is being learned to help inform decision-making

Identify intermediaries or organizations with strong networks who can help distribute resources quickly

Provide flexible support, including general operating support, whenever possible

Define what success looks like in your relief response by identifying priority outcomes and metrics, then align reporting requirements accordingly, including simplifying or temporarily pausing grant reporting when appropriate

Develop clear messaging about your role and commitment for the short, medium and long-term, and share that messaging consistently with key stakeholders, including staff, partners and community members

Early Response

First Week to First Few Months

Questions to consider

- Are our efforts aligned with the most urgent and evolving needs?
- Are we balancing speed and our commitments to equity in our response?
- Are resources reaching the people most impacted?
- How can our strategic priorities inform our ongoing relief funding?
- Where are we seeing gaps in coordination, communication or capacity?
- Who are we hearing from, and who might we be missing?
- How are we supporting partners and staff through ongoing strain?
- How can we help protect people, organizations and communities from fraud in our response?
- Where are we documenting conversations, contacts and decisions in real time?
- How can we exchange information about where resources are flowing with other local funders to ensure coordination?
- What are we learning in this phase that should inform what comes next?

PHASE 3

Checklist

- Continue coordinating closely with partners, other funders and state and federal agencies to align resources, share information and support community recovery efforts
- Expand the internal staff team coordinating the response as staff are able to contribute
- Support organizations helping communities access state and federal resources
- Ensure support is reaching the communities most affected
- Align response efforts with your broader strategic priorities
- Be open to supporting needs outside your typical focus areas
- If they don't exist already, create mechanisms and opportunities for additional funders to pool funds and contribute
- Maintain consistent communication across partners and communities

Ongoing Recovery and Rebuilding

Questions to consider

- 1 ? What are we learning about longer-term needs in this community? About our grantmaking approaches?
- 2 ? Who can teach us things that they are learning that could be helpful to us and the broader community?
- 3 ? How are we using data and feedback to guide decisions?
- 4 ? How have community priorities, partner priorities and organizational priorities shifted over time?
- 5 ? How can we support partners in telling their stories?
- 6 ? Where should we be telling our story as a funder? Our partners' stories?
- 7 ? Are resources continuing to reach communities most affected? Communities that have historically experienced disinvestment and disconnection?
- 8 ? How are we adapting our approach in the current disaster, and how will we address disaster preparedness and resilience in the future?
- 9 ? How can we continue to fund recovery collaboratively with other funders in the long-term?
- 10 ? How can philanthropic support leverage larger public funding in the long-term?
- 11 ? What role can philanthropy play in helping keep community and partner needs visible and prioritized as public attention fades and resources become more constrained?

PHASE 4

Checklist

Continue providing flexible funding and capacity-building support as part of your annual grantmaking

Address long-term impacts such as mental health and workforce strain among nonprofit leaders and community members

Consider supporting local governments and partners in accessing public funding

Consider supporting or helping establish long-term recovery groups (cooperative groups of faith-based, nonprofit, government, business and other organizations helping individuals and families through recovery)

Convene partners and gather input and data from communities to understand and lift up ongoing needs

Invite grantee partners to share lessons learned with your staff, board and the community

Increase your support for storytelling, the arts and celebrations that connect people and lift up the culture of place

Use data to guide decisions and adjust priorities

Continue adapting your approach as conditions change

Revisit and adapt your evaluation and learning approaches over time through surveys, interviews, feedback sessions or other community-informed methods

Final Thoughts

Disasters create urgent needs and often intensify challenges that communities are already facing. In moments like these, the path forward is rarely straightforward.

The work of relief, recovery and rebuilding takes time. It depends on strong relationships, clear and consistent communication, flexibility and a willingness to listen and learn alongside your partners and community.

This checklist is meant to support that work. It offers a starting point to help organizations move forward with greater clarity and intention, even in uncertain and rapidly changing moments.

If you find this tool useful in your own work, we encourage you to reflect on what is working, what is not and what you are learning along the way. Sharing those insights can help strengthen collective understanding and support more effective responses in the future.

As a foundation that benefited from the wisdom and guidance of funders and communities who faced other disasters, we are hopeful that our story and lessons serve as a resource as well.

Explore the playbook:

