

# Charity Crisis Checklist





A one page guide for trustees and leaders to spot risks early, act decisively and protect the future.



Eastside People  
Doing Good Better

## 1 Spot the early warning signs of potential crisis

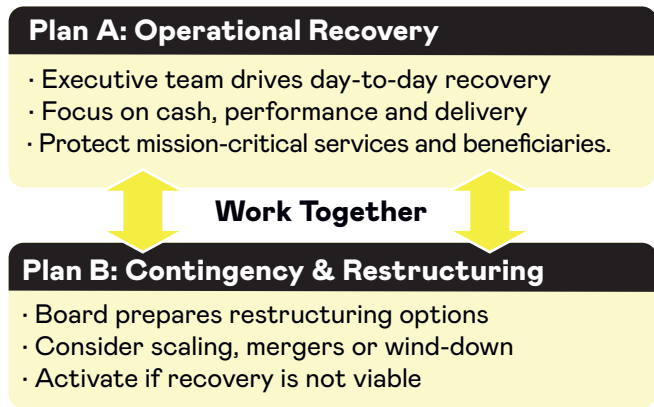
**Most charity crises are not sudden shocks – they build over time. Look for warning signs visible months or even years ahead.**

-  Unexplained or repeated deficits from year to year
-  Cashflow pressures, shrinking reserves, or delayed payments
-  High turnover or absence among senior staff
-  Rising complaints, safeguarding issues, or quality concerns

“ For us, it was a real ‘wake up and smell the coffee’ moment. Things hadn’t suddenly gone wrong – they’d been drifting for years – and people had become too comfortable with the ups and downs.”  
Chair of an award-winning environmental charity

## 3 Plan for all scenarios

**The separation of responsibilities ensures both operational recovery and strategic oversight.**



## 5 Know when to get help

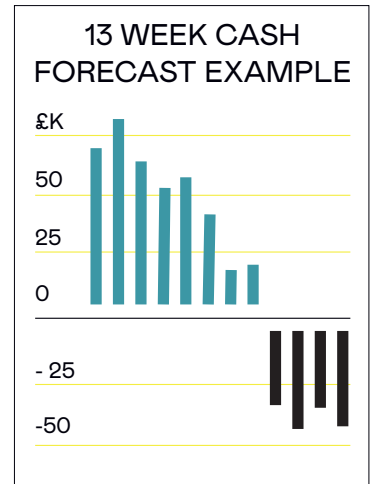
**Bring in external expertise early – it builds capacity and provides perspective and credibility.**

-  Independent review
-  Turnaround expertise
-  Legal & governance advice
-  Stakeholder mediation
-  Restructuring support

## 2 Get on top of your charity's numbers

**Clear, timely and trusted financial information enables informed decision-making.**

- Establish a single, trusted financial position
- Build a 13-week cashflow forecast (including reserves and liabilities)
- Understand profitability of each service/project
- Set a clear timeline for action, what needs to happen and when



“ When I arrived, managers told me they hadn’t had management accounts for two years.”  
CEO of a disability charity.


## 4 Manage stakeholders with clarity and empathy

**Communicate early, honestly, and build trust with:**



**Key communication principles**

- ✓ Share the facts and the plan
- ✓ Explain decisions and impact
- ✓ Listen and respond
- ✓ Provide regular updates



## Want some advice?

[Read our detailed charity crisis checklist:](https://eastsidepeople.org/insight/blog-help-for-charities-charity-crisis-checklist/)  
[eastsidepeople.org/insight/blog-help-for-charities-charity-crisis-checklist/](https://eastsidepeople.org/insight/blog-help-for-charities-charity-crisis-checklist/)

**Contact Eastside People for a free confidential crisis management session**  
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