

# Emergency Preparedness Planning Toolkit

This toolkit was developed with SMP program funds and is designed for use across the aging network to support emergency preparedness and continuity of services.



# Emergency Preparedness Planning Toolkit

**April 2025**

## **Prepared for**

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RTI Project Number 0219578.002.000.002

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## How to Use This Toolkit

Senior Medicare Patrol (SMP) program grantees play a critical role in preventing health care fraud, waste, and abuse. This role becomes even more critical during and after disasters and emergencies, when confusion, stress, and disrupted services create ideal conditions for fraudsters to exploit vulnerable individuals. For instance, following Hurricane Katrina, the FBI investigated more than 900 people involved in fraud such as identity theft and false claims for emergency benefits.<sup>1</sup> Similarly, during the COVID-19 pandemic, nearly two-thirds of adults over age 60 were targeted by scams; among those, 11% sent money, and 5% shared sensitive personal information.<sup>2</sup>

The purpose of the Emergency Preparedness Planning Toolkit is to help grantees develop a clear and actionable plan to continue delivering essential fraud prevention services during emergencies. The information provided is grounded in existing research, best practices, and input from ACL, regional administrators, and SMP grantees.

The toolkit offers practical guidance, tools, and templates you can use to develop a plan that is personalized to your community's unique needs. Whether facing natural disasters, public health emergencies, or other crises, this toolkit offers various resources to equip you to protect your operations, assist beneficiaries, adapt to changing circumstances, and take care of yourself throughout the process.

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<sup>1</sup> U.S. Department of Justice. (2008, October 1). [\*More than 900 defendants charged with disaster-related fraud by Hurricane Katrina Fraud Task Force during three years in operation.\*](#)

<sup>2</sup> Beach, S. R., Czaja, S. J., Schulz, R., Loewenstein, D., & Lichtenberg, P. (2022). [\*Financial fraud of older adults during the early months of the COVID-19 pandemic.\*](#) *The Gerontologist*.

# Why should we have an emergency preparedness plan?

Perpetrators of fraud often strike when communities are most vulnerable—during recovery from a natural disaster, health crisis, or other emergency. In 2023, insurers paid over \$92 billion for claims related to major disasters such as hurricanes and wildfires, and about 10% of that money was lost to fraud.<sup>3</sup> This reinforces the need for programs like SMP to remain operational, responsive, and vigilant. You can take steps to prepare to continue providing the best services possible to beneficiaries and families when emergencies happen. By planning for emergencies proactively with an Emergency Preparedness Plan, you can be confident in your ability to respond effectively.

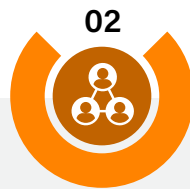
## How can we develop a plan?

This toolkit is divided into six core steps. Each step provides actionable guidance, tools, and resources that can aid planning for emergencies:



### Assess your community's risks

Understand potential hazards and gaps in your community so you can make informed decisions.



### Grow your partner network

Build and sustain relationships with local organizations that can help you provide essential services.



### Identify resources for emotional support

Understand how you can take care of beneficiaries and yourself during periods of heightened stress.



### Plan for communication and outreach

Learn communication protocols and use customizable outreach materials to get crucial information out to the public.



### Create an emergency preparedness plan

Learn the key elements of an emergency preparedness plan and see example plans you can build on.



### Train your team to implement the plan

Get training materials and resources to align staff around implementing the plan.

<sup>3</sup> National Insurance Crime Bureau. (2023, May 22). [Post-disaster contractor fraud costs Americans billions of dollars every year.](#)

# Step 1

## Assess your community's risks

Understand potential hazards and gaps in your community so you can make informed decisions.



### This section will help you:

- ☑ Determine what types of emergencies are most likely to occur in your community
- ☑ Identify the people who may need the most help during a disaster.
- ☑ Review existing community resources and gaps in disaster preparedness.

Before creating an Emergency Preparedness Plan, you need to understand the specific risks, resources, and needs in your community. A thorough risk assessment will help your program anticipate challenges across community-wide services during an emergency.

#### What is risk?

In emergency planning, risk is defined as the potential for negative impacts that result from an unexpected event.

### 1.1 Identify and rank potential hazards

Understanding the types of risks and hazards your community may be likely to face is critical for planning. You can use the Federal Emergency Management Agency (FEMA) [National Risk Index Map](#) to understand how vulnerable a community is to different types of emergencies and disasters. When reviewing the Risk Index Map, consider the following questions:

- **Likelihood of events:** How often do these hazards occur in your community?
- **Areas with elevated risk:** Which locations in your community would be most impacted by these hazards?
- **Level of capacity:** How well is your community equipped to handle these hazards?

For additional assistance with understanding hazards in your community, contact your [State Emergency Management Agency](#) or your city/county office of emergency preparedness.



**Action Item:** Document your assessments of these factors and questions in columns 1-2 in the [Risk Assessment Tool](#).

## 1.2 Identify populations that are vulnerable

Following identification of hazards, you can consider whether there are certain Medicare beneficiaries in your community that may experience heightened challenges during emergencies. To do this, you can leverage the American Community Survey and any demographic data you may have for your community to identify these populations.

All beneficiaries have some level of vulnerability because of their age or disability. Some examples of additional vulnerable populations to consider may include people who are:

- Living alone
- Institutionalized
- Living in poverty
- Lacking access to a vehicle
- Limited in English proficiency
- Living in mobile homes
- Lacking a cellular device or internet (see the [FCC National Broadband Map](#) for more details)



**Action Item:** Once all vulnerable populations in your community have been identified, document them in **column 3** of the [Risk Assessment Tool](#).

## 1.3 Understand community resources and gaps

Next, you can do additional research to help you critically assess the current resources available in your community and note where any gaps in resources exist. Start by finding out if your local Area Agency on Aging has an emergency preparedness plan and whether it includes SMPs. If it doesn't, be sure to note this gap in your risk assessment.

Next, use the questions and resources below to help guide your assessment of existing resources. Note if areas in your community have limited access to services.

Type of resource	Question	Where to find local resources*
Emergency management	Who are the key emergency management organizations in your community?	<ul style="list-style-type: none"><li>• FEMA <a href="#">State and Local Referral Lists</a> and</li><li>• USA.gov's <a href="#">State Emergency Management Agency Locator</a></li></ul>
Health care	What health care facilities (such as hospitals and clinics) are equipped to operate during these emergencies?	<ul style="list-style-type: none"><li>• Medicare <a href="#">getting care in a disaster or emergency</a></li></ul>
Transportation	What transportation services would be available to your vulnerable populations in emergencies? Are there alternative options?	<ul style="list-style-type: none"><li>• NCMM's <a href="#">Community Transportation Provider Map</a> <a href="#">↗</a></li></ul>

Type of resource	Question	Where to find local resources*
<b>Sheltering</b>	Where are the designated emergency shelters in your community? How accessible are they in an emergency?	<ul style="list-style-type: none"> <li>FEMA <a href="#">Disaster Assistance resources</a></li> </ul>
<b>Fraud</b>	What resources exist around fraud prevention?	<ul style="list-style-type: none"> <li><a href="#">National Center for Disaster Fraud</a></li> <li><a href="#">SMP COVID-19 Fraud</a> <a href="#">↗</a></li> </ul>
<b>Housing</b>	Where can beneficiaries get assistance with housing when recovering from a disaster?	<ul style="list-style-type: none"> <li>HUD's <a href="#">Disaster Resources</a></li> </ul>
<b>Older adult services</b>	What support services are available for older adults?	<ul style="list-style-type: none"> <li>ACL's <a href="#">Eldercare Locator</a></li> </ul>
<b>Disability services</b>	What support services are available for people with disabilities?	<ul style="list-style-type: none"> <li>ACL's <a href="#">Disability Information Assistance Line</a></li> <li>Partnership for Inclusive Disaster Strategies' <a href="#">Disability and Disaster Hotline</a> <a href="#">↗</a></li> </ul>

*\*Links last updated May 2025*

In addition to checking the resource links above, you can also do a quick internet search to see whether your county, city, utility providers, major employers or institutions, schools, health departments, and other local jurisdictions have emergency preparedness plans or resources you can leverage.



**Action Item:** Findings gathered from these questions can be documented in **columns 4 and 5** of the [Risk Assessment Tool](#).



## Step 2

# Grow your partner network

Build and sustain relationships with local organizations that can help you provide essential services.



### This section will help you:

- ☑ Identify partner organizations you can coordinate with during emergencies.
- ☑ Establish and maintain strong relationships with partners.
- ☑ Determine each organization's roles and responsibilities in responding to a disaster.

Building and maintaining a strong network of local and state partners before a disaster happens can help you better support beneficiaries during emergencies. Understanding each organization's roles, capabilities, and resources makes it easier to meet beneficiaries' needs and avoid duplicating efforts.

### 2.1 Identify organizations to coordinate with

To start, you can develop a list of organizations in your community that would be most beneficial to align with during an emergency. This list can include existing and potential new community partners that your SMP can coordinate with to provide referrals to needed resources.

Start with the community organizations you identified in Step 1.3, and evaluate whether you need add partners that can address any additional needs or gaps.



**Action Item:** Use the [Partner Contact List](#) to begin tracking potential partner organizations you want to collaborate with.

## 2.2 Determine agency roles and responsibilities

Clearly defining roles and responsibilities is a necessary step for effective coordination during an emergency. Once your list of proposed partner organizations has been developed, you can begin reaching out to each partner for an introductory conversation to gather important information about the organization and discuss what a partnership in emergencies would look like. Some areas may have an existing coalition for emergency preparedness coordination; if so, start there.

Before meeting, you may want to send key findings from the Risk Assessment Tool developed in Step 1 and a meeting agenda and list of questions for potential partners.

**When meeting, consider the following topics:**

- ✓ The main audiences each organization serves
- ✓ Each organization's area of expertise
- ✓ Existing emergency preparedness plans at the organization, community, and state level
- ✓ What needs each organization can address in an emergency situation
- ✓ A proposal for how your SMP and the partner organization can collaborate in emergencies
- ✓ Key and alternate points of contact in the organization



**Action Item:** Use the [Sample Partner Meeting Agenda and Guiding Questions](#) to aid with planning for meetings with partners.

## 2.3 Establish a regular communication plan

Following the introductory meeting, you can work with partner organizations to establish a regular communication plan, including methods and frequency of ongoing communication.

The partner contact list should be updated on a regular basis (at least once a year) to remain current and useful in the event of an emergency.

Some additional resources that can be used to help with establishing ongoing relationships with partners include the [RAND ENGAGED Toolkit](#) and the [UCLA Assessment for Disaster Engagement with Partners Toolkit](#).

## Step 3

# Identify resources for emotional support

Understand how you can take care of beneficiaries and yourself during periods of heightened distress.



### This section will help you:

- ☑ Identify existing mental health resources that are available during an emergency.
- ☑ Learn strategies for providing emotional support to beneficiaries.
- ☑ Provide tips to help your SMP team take care of themselves during periods of heightened stress.

Emergencies and disasters can have profound emotional and psychological impacts on all involved. You can support beneficiaries and your SMP team by learning about available mental health resources and taking steps to ensure that those who are experiencing distressing events feel supported.

### 3.1 Identify mental health resources

First, research mental health resources available to beneficiaries in an emergency. You can also consider resources that would be helpful to the needs of your SMP team in an emergency, such as managing compassion fatigue and organizational stress.

In addition to local or state resources, national resources that can be included on this list are the following:

- [Disaster Distress Helpline](#)
- [SAMHSA National Helpline](#)
- [SAMHSA Disaster Preparedness, Response, Recover, and Mitigation](#)
- [988 Suicide & Crisis Lifeline](#) 

*\*Links last updated May 2025*



**Action Item:** Use the [Mental Health Resource Matrix](#) to organize identified resources and prioritize them accordingly.

## 3.2 Help beneficiaries feel supported during emergencies

You can take steps to ensure that beneficiaries and families feel emotionally supported while getting assistance during emergencies.

Below are [best practices](#) your SMP team can follow while providing services to beneficiaries and families during emergencies, and examples for how to apply them in practice.



### **Safety and Stability**

Ensure that beneficiaries feel physically and emotionally safe.

**Example:** Speak in a calm and assuring voice. Explain that anything they share is confidential and ask if they are in a safe location before continuing.



### **Trustworthiness and Transparency**

Build trust through clear communication and actions.

**Example:** Explain your role, how the conversation will proceed, and assure them they can ask questions at any time.



### **Peer Support**

Encourage shared experiences to foster positive recovery.

**Example:** Be ready to connect beneficiaries to local support groups who can foster understanding and encouragement.



### **Collaboration and Mutuality**

Work together to find solutions rather than imposing authority.

**Example:** When beneficiaries ask for support, explore different options together. Ask which one they feel comfortable trying.



### **Empowerment and Choice**

Encourage beneficiaries to make their own decisions and validate their experiences.

**Example:** Provide clear options, reassure beneficiaries that their concerns are valid, and encourage them to choose what feels best for their situation.



### **Empathy**

Show understanding and respect for the unique experiences of every beneficiary.

**Example:** When a beneficiary shares their concerns, acknowledge their feelings, listen without judgment, and offer relevant resources to help.

Consider using the above examples to train your team to adapt their communications with beneficiaries and their families during emergencies. Additional strategies can be found in SAMHSA's [guide to helping older adults after disasters](#) and SHIP's [guide to navigating challenging client conversations](#) [↗](#).

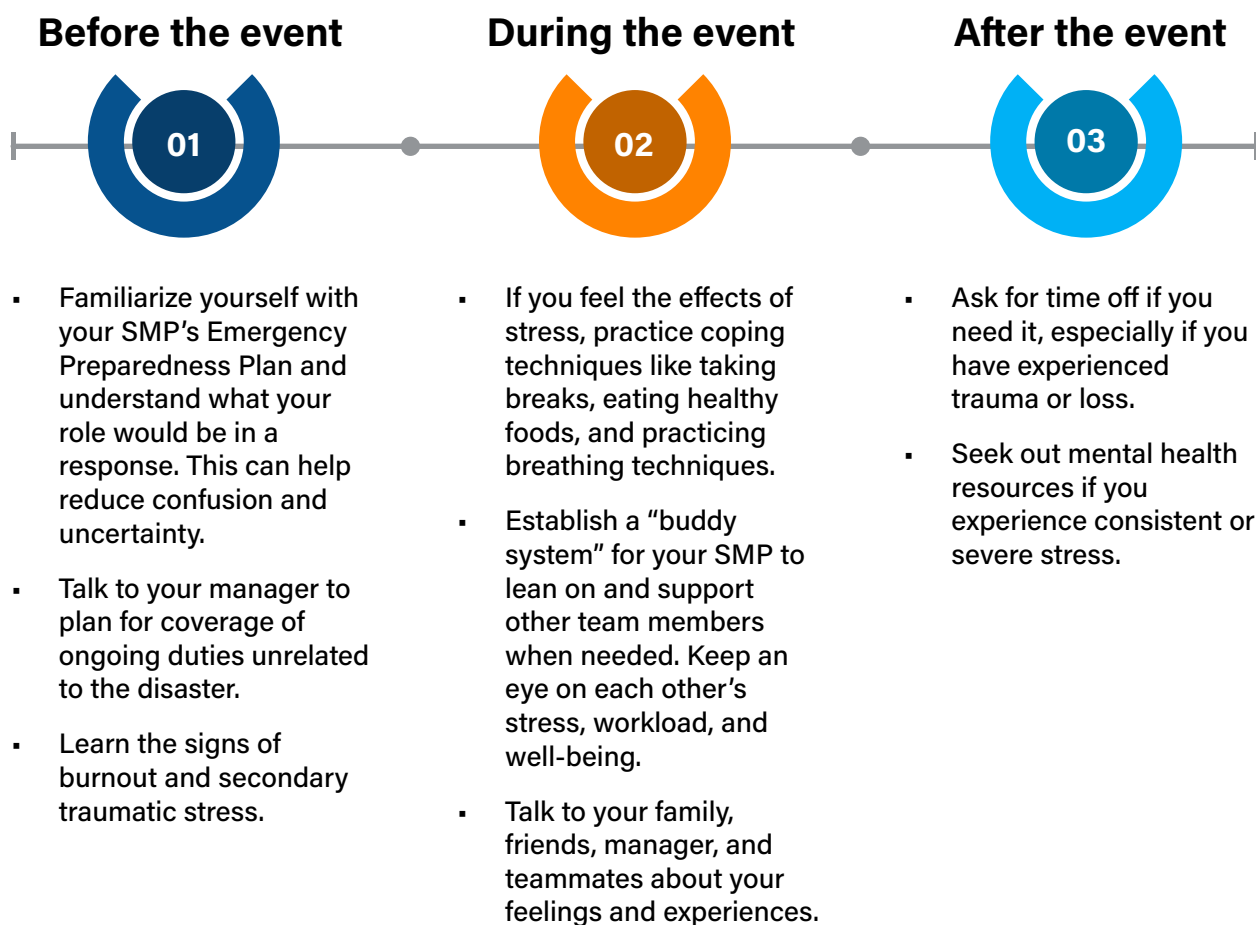
### 3.3 Take care of yourself

Providing service to beneficiaries during an emergency can also be emotionally taxing for your team. Encouraging them to remain cognizant of their own well-being can help them remain effective and resilient.




Encouraging open conversations about mental health within your SMP can also give your team a safe space to speak about their own concerns when serving beneficiaries. By promoting these self-care practices and more within your SMP, staff can learn how to recognize and address signs of burnout, fatigue, and secondary traumatic stress.

Here are some tips you can share with your SMP team for taking care of themselves before, during, and after emergencies.

#### Tips to take care of yourself



The SMP Resource Library also has additional resources for coping with job-related stress.\*

- [Coping with Organizational Stress](#) 
- [Being Resilient through COVID and Beyond](#) 
- [Self-Care Strategies to Sustain You in Your Work](#) 

*\*Links last updated May 2025*

# Step 4

## Plan for communication and outreach

Learn communication protocols and use customizable outreach materials to get crucial information out to the public.



### This section will help you:

- ✓ Plan your SMP’s protocol for communicating during emergencies.
- ✓ Learn best practices to ensure your messaging is easy to understand and act on.
- ✓ Develop outreach materials to help beneficiaries and families protect themselves from Medicare fraud during disasters.

Clear communication during emergencies can help get important and timely information to your SMP team and the community. Step 4 of this toolkit outlines sample protocols and customizable materials SMPs can use to share important information with the public to prevent fraud and scams during emergencies.

### 4.1 Develop a communication protocol

A well-structured communication protocol will ensure that vital information reaches all individuals involved. The protocol should include the following elements.

Protocol element	Examples of what you might include
<b>Priority audience:</b> What audiences do you need to reach in an emergency?	<ul style="list-style-type: none"><li>• Beneficiaries and caregivers who need protection from emerging scams</li><li>• SMP team members who need to share ongoing updates about Medicare fraud</li></ul>
<b>Communication considerations:</b> How can you ensure that information is accessible to all priority audiences? Read guidance from <a href="#">FEMA</a> and <a href="#">CDC</a> for more context.	<ul style="list-style-type: none"><li>• Materials may need to be created in accessible formats for those with disabilities (e.g., using captions, transcripts, alt text)</li><li>• Reading level may need to be assessed to reach those with lower literacy levels</li></ul>

Protocol element	Examples of what you might include
<b>Communication channels:</b> What are the most effective methods of reaching your priority audiences in an emergency?	<ul style="list-style-type: none"> <li>For beneficiaries and caregivers, this might include:               <ul style="list-style-type: none"> <li>Direct outreach (e.g., flyers in “Meals on Wheels” deliveries)</li> <li>Outreach to local media (TV, newspapers, radio)</li> <li>Web and social media</li> </ul> </li> <li>For SMP team members, this might include:               <ul style="list-style-type: none"> <li>Scheduling meetings or calls</li> <li>Sending emails to your listserv</li> <li>Text message updates</li> </ul> </li> </ul>
<b>Materials needed:</b> What materials do you need to develop for outreach via your selected communication channels?	<ul style="list-style-type: none"> <li>For beneficiaries, this might include:               <ul style="list-style-type: none"> <li>Print materials for direct outreach</li> <li>News releases, pitch emails to local reporters, radio spots</li> <li>Social media posts</li> </ul> </li> <li>For SMP team members, this might include:               <ul style="list-style-type: none"> <li>Talking points/slides for meetings</li> <li>Emails for your listserv</li> <li>Text alerts</li> </ul> </li> </ul>
<b>Important contacts:</b> Who will you partner with to get important information out to the public?	<ul style="list-style-type: none"> <li>Local community partners who provide direct services to beneficiaries and family caregivers</li> <li>Media contacts from local TV, news, and radio outlets</li> <li>A spokesperson for your SMP who can participate in interviews with the public</li> <li>A contact list of key team members who will respond in an emergency, with alternative methods of contact in case of power outage or loss of service</li> </ul>




**Action Item:** Use the [Communication Protocol](#) to document all of the above elements for your SMP’s plan for outreach during future emergencies.



You can also consider possible scenarios and challenges you might face when disseminating information, such as the loss of power, internet, or cellular service.

### Mitigation strategies may include:

- ✓ Making sure your devices are charged if you know a disaster is coming
- ✓ Ensuring that backup power sources and alternative communication methods are available
- ✓ Preparing to continuously monitor news and emergency broadcasts
- ✓ Making sure you have print materials on hand, including a referral list of local support services in case direct outreach is needed
- ✓ Reading other tips from the FCC on [Communicating During Emergencies](#)

For more information on developing your communication protocol, review Ready.gov's [Crisis Communications Plan](#) and [FEMA's Best Practices for Communicating Risk in an Emergency](#). OHIC also provides information on [Managing Your Program and Team Remotely](#) .

## 4.2 Ensure that information is easy to act on

During emergencies, it is especially important to ensure that the information you provide is understandable and actionable to all target audiences. Below are evidence-based best practices in crisis communication that your team can follow to ensure that audiences are motivated to take necessary action in response to emergencies.

Best practice	How you might incorporate it
<b>Make sure messages are clear, accurate, and timely</b>	<ul style="list-style-type: none"><li>▪ Use simple language; avoid jargon and acronyms.</li><li>▪ Ensure that messaging is in sync with other authorities.</li><li>▪ Keep messages consistent across channels.</li><li>▪ Include specific actions your audiences should take.</li><li>▪ Use visuals to support key points.</li></ul>
<b>Ensure that information is transparent and empathetic to those receiving it</b>	<ul style="list-style-type: none"><li>▪ Be honest and open, sharing as much detail as possible on what is currently known.</li><li>▪ Acknowledge uncertainty and admit if you don't know something.</li><li>▪ Try to identify and address any concerns from the public.</li></ul>

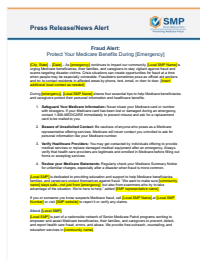
Best practice	How you might incorporate it
<b>Monitor and engage with public feedback</b>	<ul style="list-style-type: none"> <li>▪ Take in feedback from the public and make sure their questions are answered and any misinformation is dispelled.</li> <li>▪ Be sensitive to people's fears and concerns. Speak to them on a human level and try to allay their worries when possible.</li> </ul>
<b>Identify credible media teams and spokespeople who can help expand your reach</b>	<ul style="list-style-type: none"> <li>▪ Coordinate with trusted partners in your community who can be influential messengers for audiences you need to reach.</li> <li>▪ Work with the local media to ensure that the information they share with the public is accurate and informative.</li> </ul>

For more information on crisis communication best practices, read FEMA's [guidance on communicating during emergencies](#).

## 4.3 Use customizable SMP materials for outreach

It can be useful for SMPs to have outreach materials on hand that can be customized to include details of an emergency as they become available. This can help streamline the effort required to disseminate materials when time is of the essence.

We have developed the following sample materials that SMPs can use and customize to help beneficiaries and families prevent fraud and avoid scams during emergencies and access key community services.



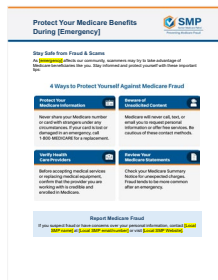
### Press Release / News Alert

Adapt this alert with pertinent information and send it to your local media contacts (television, news, radio outlets).



### Social Media / Email Language

Use these sample social media posts and emails to share relevant updates with the public as emergencies happen.



### Print Handout for Direct Outreach

Update and share this print handout at in-person events and through partner outreach (e.g., senior centers, meal delivery programs).



### Partner Referral List

Add key partner contacts to this referral list, which can be referenced by SMP team members and handed out through direct outreach to connect beneficiaries with needed services during emergencies.



**Action Item:** Use and adapt the [Outreach Material Templates](#) described above to give your SMP a leg up on getting information out to the public.

## Step 5

# Create an emergency preparedness plan

Learn the key elements of an emergency preparedness plan and see example plans you can build on.



### This section will help you:

- ✓ Understand the key components of an emergency preparedness plan.
- ✓ Develop a tailored plan using the information gathered in the previous steps of this toolkit.
- ✓ Reference existing plans to inform your own.

By now, Steps 1 through 4 have helped your team build a strong foundation for emergency preparedness. The next step is bringing everything together into a clear plan that ensures your SMP team members are ready to handle emergencies when they happen.

### 5.1 Lay the groundwork


Effective planning begins with a solid foundation. To start, form a Core Planning Team to lead the planning process. When forming this team, consider everyone's expertise in beneficiary management, crisis communication and services, and Medicare as a whole.

Following development of the Core Planning Team, your team can review the information compiled from your Risk Assessment completed in Step 1. Here, use the data gathered to guide the plan's development. Consider information about potential risks, beneficiary needs, and geography.

Additionally, you can use the data from Step 1 to determine essential SMP activities that must continue during emergencies, such as fraud prevention education and beneficiary assistance. Aside from SMP activities, consider what activities your partner organizations may help cover within the plan. Refer to your Partner Contact List from Step 2 to aid with this.

Following activity coverage, your team can also consider any state and federal requirements when planning for emergencies. Here, review state and federal guidelines, and ensure that your plan aligns with the regulatory expectations in place.

Consider the following resources when developing the groundwork for your plan\*:

- [ACL Template for Continuity of Operations Plans \(COOP\)](#) 
- [USA.gov State Emergency Management Agencies](#)
- [ACL Crisis Management and Emergency Response Capabilities](#)
- County/city offices of emergency preparedness
- Your local Area Agency on Aging's Emergency Preparedness Plan (if applicable)

*\*Links last updated May 2025*

## 5.2 Develop the plan

Once the groundwork has been established, your team may now develop the plan. Essential elements to include are:

- **Mission essential functions:** Those functions necessary to continue to provide vital services and sustain an economic base during an emergency.
- **Delegation of authority, roles and responsibilities** (can use the [Authority Delegation Worksheet](#) to assist with outlining this): The order of succession for SMP leadership, and who will take on various duties in an emergency.
- **Inventory of community resources:** Availability of power generators, nearest public health and emergency service providers. Who are important suppliers to maintain continuity of service, and what are alternatives if they are not available.
- **Communication protocols:** Plans for communication with SMP team members, beneficiaries, and the community during an emergency.
- **IT functions and security:** Protecting computer hardware and software.
- **Vital data and records:** How vital information is stored; backup and protection of data and vital records.
- **Personnel issues and coordination:** Addressing the safety and well-being of your SMP team.






- **Funding continuity:** For example, cash or credit available to ensure continued operations during an emergency.
- **Facility preparations/alternative facilities and telework:** For example, facility evacuation plan, safe location of flammable materials, emergency first aid supplies.
- **Training and testing:** Location of EPP, plans for training your SMP team, exercises for testing emergency scenarios.



**Action Item:** Use the [Emergency Preparedness Plan Template](#) to determine the contents of your plan and how to best organize it. Additionally, you can also reference older or existing plans from other SMP chapters or partner organizations to serve as examples for development.

Following development and finalization of your plan, share it with key team members who will be involved in its implementation. This will be important for Step 6, in which you will train your team members to execute the plan.

You may also use the following resources as you draft your plan\*:

- [FEMA Continuity Plan Template for Non-Federal Entities and Community-Based Organizations](#)
- [FEMA Developing and Maintaining Emergency Operations Plans](#)
- [ACL Template for Continuity of Operations Plans \(COOP\)](#) 
- [ACL OHIC Continuity of Operations Plan \(COOP\) Supplementary References and Examples](#) 
- [SHIP Toolkit for Delivering Services Remotely](#) 
- [SMP Modifying Volunteer Workflow, Support, and Responsibilities: Preparing for Remote Medicare Open Enrollment Toolkit](#) 
- [SMP Remote Open Enrollment Manual and Marketing \(Rhode Island\)](#) 

*\*Links last updated May 2025*

## Step 6

# Train your team to implement the plan

Get training materials and resources to align staff around implementing the plan.



### This section will help you:

- ☑ Run training exercises to ensure your team knows how to carry out your emergency preparedness plan.
- ☑ Learn ways to strengthen your team's ability to respond effectively during disasters.

To effectively carry out your emergency preparedness plan, it's crucial that all team members are familiar with the plan and understand their specific roles. Regular training sessions help ensure everyone is aligned with the plan, clear about their responsibilities, and ready to respond when emergencies occur.

### 6.1 Conduct exercises to test the plan

To test key elements of the plan, simulate emergency scenarios to evaluate the practicality of the plan and address any gaps. For example, role-playing emergency scenarios can give your team an opportunity to practice delegation and decision-making in an emergency.

After each scenario exercise, collect feedback from your team to understand what worked for them and what improvements are needed. Soliciting input from your team at this stage can also encourage open dialog within your SMP to surface other potential challenges for consideration within your plan. Based on this feedback, you can revise and update the plan accordingly.

To ensure that your plan is continuously up to date, revisit the plan and training materials on at least an annual basis to update content as needed.

To aid with conducting exercises, consider Ready.gov's [Exercises](#) and [Emergency Preparedness Testing](#).



## 6.2 Train your team

An emergency preparedness plan is not useful if team members are not familiar with it or don't know how to implement it. To begin, set up a meeting with key SMP leaders. Use this meeting as an opportunity to orient team members to the plan by providing an overview of its contents and emphasizing how the plan supports your SMP's continuity during emergencies. Here, you can also clarify individual responsibilities to ensure that everyone understands their specific duties, who to engage with, and when.

Following an initial orientation, you can set up trainings for all team members so they may learn how to execute their responsibilities. Consider which medium for training delivery you would like to use, such as videos, readings, or interactive workshops. Initial training efforts should focus on individuals with essential duties.

Along with training development, you can also implement a refresher training schedule to ensure that your team is up to date on their responsibilities if the plan were to be executed for an emergency.

To help guide your trainings, consider the following resources\*:

- [FEMA Organizations Preparing for Emergency Needs \(OPEN\)](#)
- [SMP Modifying Volunteer Workflow, Support, and Responsibilities: Preparing for Remote Medicare Open Enrollment Toolkit](#) 
- [CDC Public Health Emergency Preparedness \(PHEP\) Connects Webinars](#)
- [HHS/ASPR Access and Functional Needs web-based training](#) 

*\*Links last updated May 2025*



**Action Item:** View and share the [Trainings on How to Use this Toolkit](#) to help your team learn how they can prepare for emergencies.



## Tools and Templates

### Risk Assessment Tool

Fill out the fields below to document the results of the risk assessment activities described in **Step 1**.

Potential hazard	Likelihood of occurring	Communities most vulnerable	Potential gaps in services	Resources available

## Partner Contact List

Fill out this contact list with partner organizations that you can coordinate with to provide services to beneficiaries and families during emergencies.

Organization	Brief description of emergency role/service	Key contact(s)	Key contact(s) email and phone number	Address and website

## Sample Agenda/Questions to Ask Potential Partners

Use the sample agenda below to guide your meetings with potential partner organizations.

### Target audiences served

- What specific populations or regions does your organization provide services to?

### Programs, area of expertise

- What programs does your organization offer?
- What knowledge, skills, and expertise do you have?

### Existing emergency preparedness plans

- Does your organization have existing roles and responsibilities outlined during emergencies?
- How do you get information out to the public during emergencies?
- Does your organization support disaster recovery efforts over the long term?

### Beneficiary needs they may help address during an emergency

- What services or resources does your organization offer?
- Does your organization collaborate with other local nonprofit or government agencies that provide similar services?

### Key contact people, including alternate means of contact in case of emergency

- Where can we refer beneficiaries to (website, phone, email)?
- Are there any backup methods of communication you use during emergencies?

## Mental Health Resource Matrix

Use this matrix to develop a list of mental health and emotional support resources.

Organization	Resource	Useful for...	Formats supported	Languages supported	Easily accessible?

# Communication Protocol

Fill in the table below to plan for how your SMP will communicate to key audiences during emergency situations.

Audience	Accessibility considerations	Communication methods	Important contacts


# Outreach Material Templates

Use and adapt these templates to create materials your SMP can use to communicate with the public during emergencies.

To download these materials, visit the **SMP Resource Center**.

## Press release/news alert

**Press Release/News Alert**



**Fraud Alert:**  
Protect Your Medicare Benefits During [Emergency]

[City, State] - [Date] - As [emergency] continues to impact our community, [Local SMP Name] is urging Medicare beneficiaries, their families, and caregivers to stay vigilant against fraud and scams targeting disaster victims. Crisis situations can create opportunities for fraud at a time when people may be especially vulnerable. Fraudsters sometimes pose as official aid workers and try to contact residents in affected areas by phone, text, email, or door to door. [Insert additional local context as needed]

During [emergency], [Local SMP Name] shares four essential tips to help Medicare beneficiaries and caregivers protect their personal information and healthcare benefits.

- 1. Safeguard Your Medicare Information:** Never share your Medicare card or number with strangers. If your Medicare card has been lost or damaged during an emergency, contact 1-800-MEDICARE immediately to prevent misuse and ask for a replacement card to be mailed to you.
- 2. Beware of Unsolicited Contact:** Be cautious of anyone who poses as a Medicare representative offering services. Medicare will never contact you uninvited to ask for personal information like your Medicare number.
- 3. Verify Healthcare Providers:** You may get contacted by individuals offering to provide medical services or replace damaged medical equipment after an emergency. Always verify that health care providers are legitimate and enrolled in Medicare before filling out forms or accepting services.
- 4. Review your Medicare Statements:** Regularly check your Medicare Summary Notice for unfamiliar charges, especially after a disaster when fraud is more common.

[Local SMP] is dedicated to providing education and support to help Medicare beneficiaries, families, and caregivers protect themselves against fraud. "We want to make sure [beneficiary name] stays safe - not just from [emergency], but also from scammers who try to take advantage of the situation. We're here to help," added [SMP representative name].

If you or someone you know suspects Medicare fraud, call [Local SMP Name] at [Local SMP Number] or visit [SMP website] to report it or verify any claims.

About [Local SMP]

[Local SMP] is part of a nationwide network of Senior Medicare Patrol programs working to empower and assist Medicare beneficiaries, their families, and caregivers to prevent, detect, and report health care fraud, errors and abuse. We provide free outreach, counseling, and education services in [community name].

## Sample social media and email language



**Medicare Beneficiaries and Families:**

Follow **four essential tips** to safeguard your Medicare information and benefits during an emergency.




SMPRESOURCE.ORG

877.808.2468

## Print materials

**Protect Your Medicare Benefits During [Emergency]**



**Stay Safe from Fraud & Scams**

As [emergency] affects our community, scammers may try to take advantage of Medicare beneficiaries like you. Stay informed and protect yourself with these important tips.

**4 Ways to Protect Yourself Against Medicare Fraud**

**Protect Your Medicare Information**

Never share your Medicare number or card with strangers under any circumstances. If your card is lost or damaged in an emergency, call 1-800-MEDICARE for a replacement.

**Beware of Unsolicited Contact**

Medicare will never call, text, or email you to request personal information or offer free services. Be cautious of these contact methods.

**Verify Health Care Providers**

Before accepting medical services or replacing medical equipment, confirm that the provider you are working with is credible and enrolled in Medicare.

**Review Your Medicare Statements**


Check your Medicare Summary Notice for unexpected charges. Fraud tends to be more common after an emergency.

**Report Medicare Fraud**

If you suspect fraud or have concerns over your personal information, contact [Local SMP name] at [Local SMP email/number] or visit [Local SMP Website].

## Referral list

**[Local SMP Name] Partner Referral List**



*Last updated: [insert date]*

[Local SMP Name] has compiled a list of partner organizations that can provide services to older adults, people with disabilities, and their families during emergencies. This list was last updated on [date last updated].

<b>Emergency Management</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]	<b>Transportation</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]
<b>Health Care</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]	<b>Fraud</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]
<b>Health Care</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]	<b>Fraud</b> [Organization Name] [Description of Organization] [Organization's Address] [POC at Organization] [POC's email phone number] [Organization's Website] [Services organization can provide to beneficiaries during an emergency event]

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## Delegation of Authority

Determine roles and responsibilities during emergencies for your SMP.

Position	Key contact	First alternate	Second alternate	Third alternate
Incident commander				
IT				
Safety				
Operations				
Finance				
Logistics				

## Emergency Preparedness Plan Template

Fill out the following sections of your SMP's Emergency Preparedness Plan.

<b>Essential functions</b>	
<b>Event-specific procedures</b>	
<b>Records and IT</b>	
<b>Roles and responsibilities</b>	
<b>Delegation of authority</b>	
<b>Personnel</b>	
<b>Support for your SMP team</b>	
<b>Communications plan</b>	
<b>Alternate locations and telework</b>	
<b>Funding</b>	
<b>Training and exercises</b>	
<b>Plan maintenance and review</b>	
<b>Definitions</b>	



## Trainings on How to Use This Toolkit

View recorded trainings to train your SMP team on how to use this toolkit to plan for emergencies.

To view the recorded trainings, visit the **SMP Resource Center**.

