CRISIS MANAGEMENT FRAMEWORK

PROTECTING YOUR FAMILY BUSINESS

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Quick Response Action Plan

1. Verify and assess the issue
2. Notify pertinent staff and remind them of role in crisis.
3. Assess the crisis level.
4. Crisis/communication management.
5. Develop response plan/messages.
6. Approve and release messages.
7. Monitor and provide feedback.

Step One—Verify and Assess Situation

Find out what, when, who, why, and how:

- What happened and where?
- When did the issue emerge?
    - *Establish a time frame.*
- Who is involved—programs, participants, etc.
    - *Identify the point people on the program side.*
- How did it happen?
- What has been done and what is currently being done?
    - *Identify what steps have already been taken.*
    - *Identify what the next step is.*
- What other information is needed?

Other considerations:

- Is the issue confirmed?
- Is the information coming in verifiable and consistent?
- Is the information source credible?
- Is the information coming in from multiple sources? If so, is each source telling the same story? What is consistent, what information varies?

Step Two—Notify Team

Notify the crisis management/communications team immediately.

Crisis Communication Team

1. Final Decision Maker/Organization Leader
2. Legal Counsel/Legal Adviser
3. Senior staff/Consensus decision making team
4. Communications staff
5. Board of Trustees/Directors/Political Leaders
6. Others

CRISIS MANAGEMENT TEAM ASSIGNMENTS:

Role	Responsibilities	Point Person(s)
Crisis Management Team (CMT) Leader	Coordinates response. Coordinates with affected programs. Final approval on publicly disseminated information. Arranges scheduled and emergency team meetings, works with staff advisors. Oversees broad and specific team functions. Ensures necessary resources are available to team members.	
Crisis Communications Coordinator	Assists the TL with prioritizing and handling inquiries. Fulfills duties of CCT Leader in their absence. Works closely with Media Liaison to ensure message accuracy.	
Final Decision Maker	To be determined, spokesperson?	
Staff Advisors/Consensus Decision Making Team	Provide communication input depending on their area of expertise:	
Media Liaison	Works with CMT TL to publicly issue statements to the media and public. • Press Releases • Social Media • Website	
Legal Counsel/Adviser	Legal advice on communications strategy. Approves messages before release.	

Depending on the issue, notify additional pertinent staff.

CONTACT PROTOCOL:

Team:

List of personnel to be notified:

1. Name, Position
    a. Phone Number:
    b. Email:
    c. Time Zone:
2. Name, Position
    a. Phone Number:
    b. Email:
    c. Time Zone:
3. Name, Position
    a. Phone Number:
    b. Email:
    c. Time Zone:
4. Name, Position
    a. Phone Number:
    b. Email:
    c. Time Zone:
5. Name, Position
    a. Phone Number:
    b. Email:
    c. Time Zone:

Leadership:

1. Decision Maker
    a. Phone Number:
    b. Email:
2. Board Chair
    a. Phone Number:
    b. Email:
3. Consensus Decision Making Team
    a. Phone Number:
    b. Email:

Senior Leadership:

1. Name, Position
    a. Phone Number:
    b. Email:

Other:

1. Name, Position
    a. Phone Number:
    b. Email:

Step Three—Assess Crisis Level

How urgent is the need for information about the situation—low, medium, high, urgent? Plan communication responses accordingly.

Step Four—Crisis/Communication Management

1. Schedule regular internal updates on the situation.
    a. Dedicate a communications channel (email list; Teams channel; Slack channel) specifically to the issue, where all company communication will take place.
    b. Whenever possible, **reiterate your public communications to your team.** As a company, it's crucial to be on the same page.
2. Schedule regular updates with affected parties.
    a. Make sure the affected individuals know who the point person for the situation is and have their contact information.
    b. Depending on the scale of the issue, create an issue update section on the website, with pertinent information surrounding the problem and contact info for the crisis contact person.
3. Start a crisis inquiry log to track incoming communications from external stakeholders/customers/affected parties.
4. Place promotional content—all avenues—on hold until the crisis is resolved.

Step Five—Develop Response/Messages

During this step, the Crisis Management Team should:

- Determine timeline for response and next steps.
- Assess risk/liability.
- Develop action alternatives/options for response.

During this step, the Crisis Communications Team should:

- Determine a script for conveying key information points.
- Develop a list of questions that could be asked by a variety of audiences about the crisis.
- Update pre-scripted messages to reflect the issue or develop new messages.
- Be prepared to address how the organization has dealt with similar issues in the past.
- Identify audiences for messages: internal, external, stakeholders, media, etc.
- Identify the best methods for delivery of key messages.
- Monitor crisis and update messages based on the crisis.
- Ensure that all the information presented is accurate and current.

Step Six—Approve and Release Messages

Once messages are developed, they will be distributed internally to employees and externally to stakeholders, affected programs and clients, and the media (if necessary). Before any messages are released, they need to be approved by the following:

1. Crisis Management Team Leader
2. Crisis Communications Team Leader
3. Executive Director/ CEO/ President/Chair of Board/Head of School/Political Leadership
4. Legal Counsel/Adviser
5. Other members Crisis Team/Subject Matter experts as appropriate

Media Policy

In a crisis, all media inquiries are to be handled by the executive director/chief executive/head of school or his/her/their designee, regardless of who the media representative is, whom he/she/they represent(s), or how innocuous the request.

All press releases or other promotional materials are to be approved by the executive director/chief executive/head of school or his/her/their designee prior to dissemination.

Failure to comply with media policy is grounds for disciplinary action.

Only the executive director, chief executive, board president, board chair, or other individual(s) designated by the board are authorized to speak with the media. The executive director/chief executive/head of school and the board designate shall collaborate on message development and coordinate who will handle press inquiries.

Employees, board members (other than the chair) and members acting in a capacity within a committee or a caucus shall not make statements, provide information for distribution, or provide background information unless specifically directed to do so by the executive director/chief executive/head of school and/or the board.

Provided that they have prior permission to do so from the executive director, chief executive or the board, employees, board members, and members acting in a capacity with a committee or a caucus shall speak publicly on behalf of the organization only in accordance with established public speaking procedures.

Media Inquiry Procedures

Intake contact: *Media Liaison*
Other contacts: *As appropriate*

Responding person: *Final Decision Maker/CMT/Communications Coordinator*
Other contacts: *As appropriate*

Description

How to handle inquiries from any media such as newspaper, radio, TV, cable access, magazine, trade organizations, etc.

Background

Organization strives to communicate information transparently and honestly in a manner consistent with the values and mission. This includes contact with the media. It is important for all staff and board members to reinforce these messages by referring all calls from any media source to the appropriate staff.

Procedure

1. Please refer all calls or visits to the media liaison
2. If media liaison is not available, take the following steps:
    - Find out the reporter's name, phone number, and deadline.
    - Find out the nature of the story ("May I ask what kind of a story you are working on so that we can gather the information and have all the facts when we call you back?"), OR, you can offer to let the reporter leave a detailed voicemail message.
    - Let the reporter know that someone will return the call by a stated time and date.
    - Contact Crisis Communications Team Leader immediately.

Please do not offer information to media — even if you know the answer. It is helpful for the organization that all news contacts be handled by appropriate staff and documented. Also, it's too easy to get quoted as an organization spokesperson if you volunteer something the reporter wants to use. Assure the reporter that someone will respond in time to meet the deadline.

THINGS TO REMEMBER WHEN DEALING WITH THE MEDIA:

- Be polite.
- Be helpful.
- Find out what the reporter needs to know and what his or her deadline is.
- Don't let a deadline pass without a response.
- Don't get drawn into providing information or opinions that you don't have the authority to provide.
- There is no such thing as "off the record" or "on background." Anything you say can be reported.
- Always inform Crisis Team Leader/Media Liaison of the call for follow-up.

Holding Statements

Develop a holding statement that can be used in the short-term as we are gathering information. Draft examples of holding statements in the event of litigation:

Press Release Template

If appropriate based on the nature of the crisis:

- Values of organization.
- This is what we know.
    - (This could be your holding statement): "We have begun an inquiry into the issue and are working to determine the facts of what has happened."
- This is what we have done to respond to the situation.
- This is what we will do to prevent the situation from happening again.
- This is what we are doing to rectify the situation.
- Our point person is *insert person here*. You can reach them at any time at *insert contact information.* Please let us know how we can support your agency as we resolve this issue.
    - "We will keep you informed as we learn more."

Social Media Crisis Communication Plan

Point People:

Name of point of contact
Work Phone:
Personal Phone:
Email:

Name of secondary point of contact
Work Phone:
Phone:
Email:

Plan:

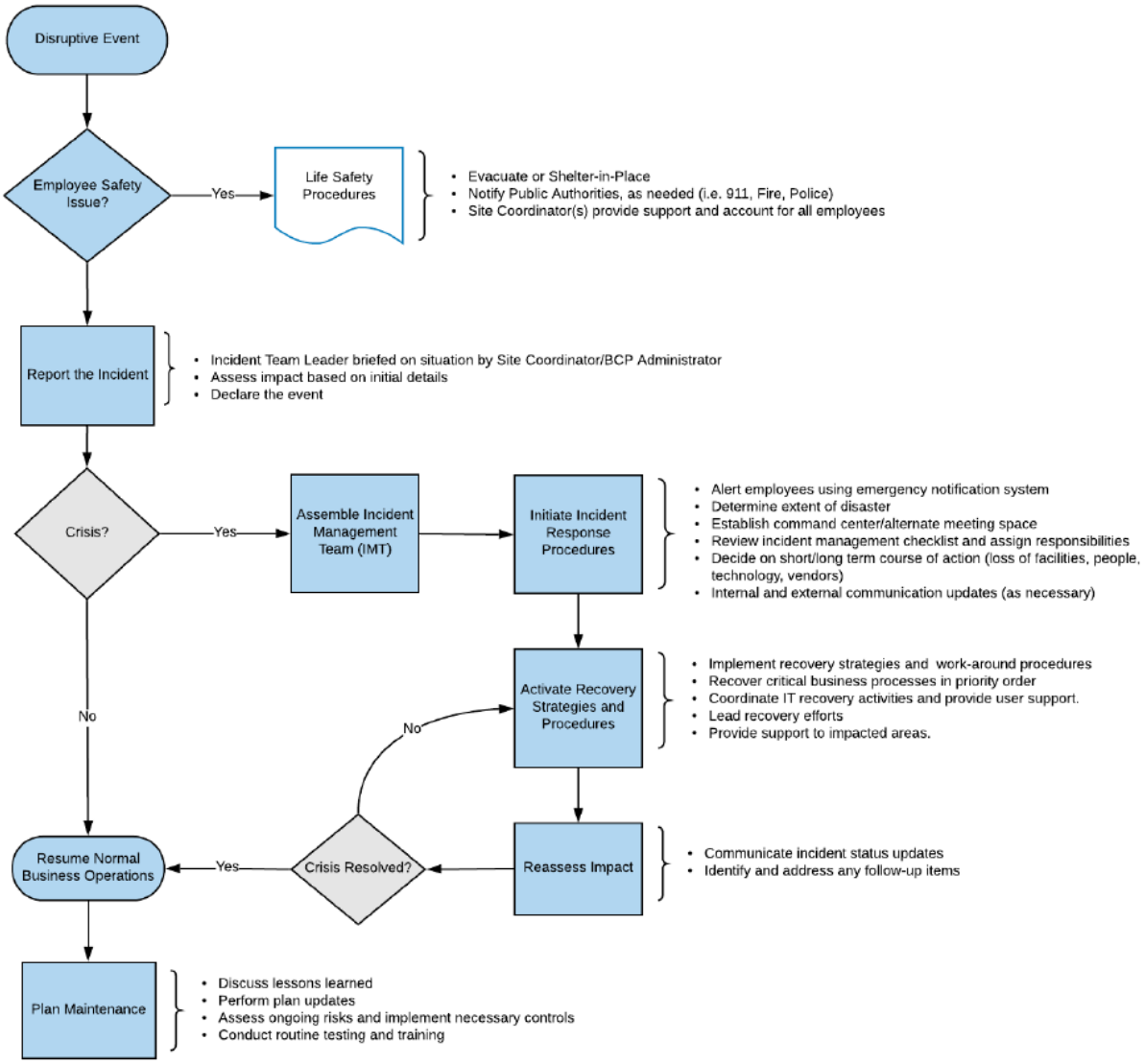
1. Update frequently, if appropriate.
2. Make sure all information communicated is correct and current.
3. Create working hashtag specifically for crisis, if appropriate.
4. Respond to questions or comments about the situation.
    a. Kindly
    b. Honestly
    c. Quickly
    d. Follow established rules for monitoring/blocking inappropriate comments/misinformation.

Step Seven—Monitor Communications and Provide Feedback

1. Review crisis coverage and outcomes
2. Identify story trends and ongoing issues
3. Identify public and key stakeholder issues
4. Modify the response as necessary

Business Continuity Framework

The following chart outlines the Business Continuity Plan framework and incident management procedures. Once the threat event has been confirmed, the defined business continuity response and recovery procedures will be activated.



Resources

Emergency Contact List

1. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:
2. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:
3. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:
4. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:
5. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:
6. Name, Position
    a. Work Phone:
    b. Personal Phone:
    c. Email:

General Risk Assessment

Top Threats and Vulnerabilities:

1. Litigation adverse to the organization
2. Technology issues/operations/ransomeware/data breach
3. Physical emergency/natural disaster/pandemic
4. Harassment/sexual violence/workplace violence
5. Staff issues
6. Leadership transition
7. Workplace deaths
8. Others?

Resources Needed to Protect Critical Functions:

1. Staff
2. Internet access
3. Backup data
4. Backup servers
5. Backup communications system