

# Smart Plan

**Spitfire's Guide to Crisis Prep  
and Management**



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# Introduction

Accusations that you crossed the lobbying line put your tax status in jeopardy. An opposition group secretly records a staff person allegedly doing something nefarious. Your CFO cooks the books and embezzles money. A media outlet publishes an investigative report questioning the credibility of your organization. A staff person posts a racist comment on social media.

No matter how solid your organization seems, a crisis could be right around the corner.

When a crisis hits, having a plan in place will allow you to spend precious moments and resources handling the situation rather than scrambling to figure out what to do. This guide will help you anticipate crises, prevent them when possible and prepare to respond to those that may still arise.

There is no foolproof way to predict what an attack will be or when it will come. However, there are steps that your organization can take to protect against the range of potential threats, filling in the cracks and laying the groundwork for a rapid response campaign.

Spitfire offers four steps that will help any nonprofit assess its risks, identify potential sources of attack, minimize risks and leverage its strengths. This simple approach will help you shore up vulnerabilities and rest easy knowing that no matter what comes next, you're ready for it.

## Prepare Step 1: Assess Your Risk

You know your organization inside and out. Where are you most vulnerable? Identifying potential threat points will leave you better prepared to respond to a crisis – or prevent it altogether. Here are some questions to help you assess your risk level.

- YES  NO Does your organization/your issue have strong opposition?
- YES  NO Is your issue polarizing or controversial?
- YES  NO Is your issue popular or hot on the political agenda?
- YES  NO Does your organization get frequent media attention (positive and/or negative)?
- YES  NO Are there high-profile people on your board or affiliated with your organization? If they find themselves in the midst of a personal controversy, would it reflect badly on your organization? (Think Josh Duggar getting dropped by the Family Research Council after he admitted that he sexually abused four young girls.)
- YES  NO Are you affiliated with organizations that are frequently in the line of fire?
- YES  NO Are you a large organization that doesn't have its internal systems buttoned down (there's no social media policy; the board doesn't know what it can or can't say; there's no HR training about sexual harassment)?

Add up the number of times you answered yes.

0-2: You're Tom Cruise in Cocktail – you just got to your island paradise and don't have a care in the world. Life is good and your risk is low, but it's still smart to be prepared.

2-4: You're Tom Cruise in The Firm – things feel fine now but something may be brewing under the surface. Keep that crisis plan close to your desk.

5-7: You're Tom Cruise in Risky Business – living on the edge. Keep your crisis team on speed dial and regularly review and update your plan.

## Prepare Step 2: Assess Your Opposition

To prepare for external crises, scan opposition websites, email lists and social media channels. Track their media coverage, listen to their speeches and know their talking points so you can prepare a response.

Set up Google Alerts and a social media monitoring tool to keep track of their activities.

Understand their greatest assets so you can prepare to counter them. For example, the Human Rights Campaign (HRC) knew the opposition would be out in force to fight marriage equality. The National Organization for Marriage (NOM) is one of its top adversaries. HRC did exhaustive research on NOM to understand who they are and how they operate. HRC then launched <http://www.hrc.org/nomexposed> to expose NOM and get out in front.

Can you anticipate the tactics your opposition will use? Are they likely to pepper you with lawsuits to sap your time and resources? Spend big money on advertising to try and win the message battle? Generate crowds at events to demonstrate support for their position? All of the above?

Take a look at what they've done in the past because it's the best predictor of what they will do in the future. Develop a dossier on your opposition that offers a clear picture of what you're up against.

Continuously monitor the opposition and keep tabs on what they're up to.

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## Prepare Step 3: Minimize Risk

What actions can you take to minimize the chance of something becoming a controversy? Is there anything you can do to reduce the likelihood of an attack? Here are some points to consider.

**Does your organization . . .**

**. . . work on electoral, advocacy and/or politically charged issues?**

Have an attorney train your staff to ensure they understand legally permissible c(3) and c(4) electoral activities.

Organizations like Alliance for Justice's Bolder Advocacy initiative and Independent Sector specialize in helping nonprofits understand what they can and cannot do as advocates.

**. . . think the opposition may be snooping?**

Make sure your email list, website and events are secure.

If your organization disseminates information to email subscribers, include questions in the sign-up process that will help you vet people who are signing up to receive your materials. Regularly review your email lists and delete people you don't know. Whenever you send information, review it with an eye for any language, content or context that opposition could use against you. Make sure your website and email system are protected with the latest hacking security software.

For private events, post a staff person at the sign-in desk who knows who's who and can identify party crashers. If there are reporters at the event, make sure a staff person monitors who they interview and what is expressed to them to avoid "gotcha" moments.

Limit what you distribute to your online list or at events if there is a chance the materials could hurt you if they land in the wrong hands.

**. . . have strong internal systems to keep employees and board members legally and ethically sound?**

Hire an HR consultant to train staff on issues like sexual harassment in the workplace. Communicate clearly with staff, board and volunteers about any sensitive information that they should not share publicly (e.g., financial statements, funding decisions, personnel issues).

**. . . have a social media policy?**

All organizations need to have a clear social media policy. Idealware offers a good template and advice for putting one in place.

Even though staff members' social media accounts are generally personal and not affiliated with your organization, a crisis could bring them under scrutiny. For example, when a civic engagement organization was accused of mishandling voter registration forms, the opposition published a Facebook photo of one of the group's staff people wearing a T-shirt with the organization's logo and drinking a beer while registering voters at an outdoor event.

Regularly review your social media policy with staff and ensure that it's part of the onboarding process for any new staff members. In the event of a crisis, encourage employees to refrain from posting anything about the details of the crisis or commenting on blogs, articles or other online communities unless otherwise directed.

In the digital age, nothing is private. For example, when New Jersey Governor Chris Christie came under fire for the George Washington Bridge lane closures, staff members were surprised to learn that investigators were allowed to subpoena personal email accounts.

**. . . and a traditional media policy?**

Make sure staff know and understand your organization's media response policy. The policy should be clear about where to direct media calls and which staff members are permitted to talk with reporters.

## Prepare Step 4 – Maximize Strengths

If you are staring down the barrel of a crisis, what are the types of things that you may need or want to do immediately? Steps you take now can set you up for greater success if and when the time comes.

**SUPPORTERS:** What makes your organization shine? Do you have an army of grassroots advocates prepared to respond when you need them? If you have a core group of supporters willing to show up at events, consider how you can incentivize and expand this resource. Offer frequent praise and thanks. Invite them to a fundraiser at no cost, or host a party in their honor. Make sure regular supporters feel appreciated and recognized for their efforts.

**ONLINE PRESENCE:** Are digital channels your go-to way to communicate with supporters? How are you growing your networks? Work to build your online community on Twitter and Facebook. The more engaged your social media audience is, the easier it will be to leverage support when a crisis breaks. An active social media audience can also serve as a strong line of defense and help disseminate a response to misinformation.

**COALITION PARTNERS:** Do you frequently work in coalitions or with close allies? If you want their support when you need it, support them when they need you. Sign on to support letters. Help them turn out participants at events. Share their online content.

**MEDIA RELATIONSHIPS:** How well do you know the reporters who cover your issues? Take them to coffee or lunch so they get to know you and your organization better. Offer reporters resources and information on background that will make their jobs easier. If you develop a good relationship with the reporters who are most likely to cover your issue, they will be more likely to give you a fair hearing if a crisis strikes.

**POLICYMAKERS:** What about policymakers who hold sway over your issues? Just like reporters and coalition partners, it is important to cultivate strong relationships with these outside validators in advance so they will stand up for you during a crisis.

When an anti-abortion organization called the Center for Medical Progress (CMP) captured undercover videos of Planned Parenthood Federation of America (PPFA) executives allegedly discussing the sale of fetal tissue, PPFA was ready to leverage its strengths. More than 2.4 million people signed a petition defending PPFA and opposing Republican congressional efforts to defund the organization. A group of 92 allied organizations including women's rights, labor, LGBT, religious, civil and human rights sent a letter to House and Senate leadership saying, "We stand with Planned Parenthood Federation of America during this time of vicious political attack."

Planned Parenthood supporters blew up the Twittersphere. More than 27,000 tweets used the hashtag #StandwithPP. Countless Planned Parenthood staff, volunteers, patients and supporters took to social media to share their support for the organization. Members of the House of Representatives called on the Attorney General to investigate CMP and a White House spokesperson gave a statement of support for PPFA.

## Plan Part 1: Your Team

If a crisis strikes, you will need a core crisis communication team that plans and implements responses. Identifying that team in advance will allow you to activate it quickly.

Make sure each member of the response team understands his or her role. If you anticipate needing outside experts (e.g., a communication consultant, a board member, an attorney), secure their participation in advance and include them in the plan.

Be clear about the decision-making process. Understand who makes the final call. If the executive director or CEO is the decision maker, but is off the grid, is someone else deputized with that authority?

The response will start by answering the following questions:

- What happened?
- What information does the team need to gather before responding?
- Who needs to be told? When and by whom?
- What will the response be and how (one-on-one conversations, email, through the media, town hall meeting, etc.)?
- Is there an ask?

Keep the size of the crisis team manageable. You need to be able to make decisions and move quickly. Include only people who are critical for approval and implementation of the strategy.

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## Plan Part 2: Your Response

Go to your list of potential risks (Worksheet #1). For each one, consider your response. What message(s) would you want to get out quickly? Who would be the best person to deliver the messages? What would the opposition say and how should you respond?

Remember that a crisis presents an opportunity to bridge back to your organization's core messaging. That messaging should stay consistent throughout any crisis and across audiences. Tailor your messages to your priority audiences. Avoid engaging in a heated debate directly with the opposition.

Crises can be emotional. Understand the emotional and rational barriers of your audience(s) and your staff. Craft messages that take these barriers into account. What do you want your core audiences to feel when they think of your organization during the crisis? What do you need your target audiences to believe about you and your work? If your audience is scared, it may need to see you as being calm. If your audience is angry, it may need to see that from you. If the audience is angry at YOU, it may need to see you being conciliatory. Your words will communicate half the message, your tone and behavior will convey the rest.

Your own reaction to a crisis also may be emotional. If it's an internal problem, you and your staff may feel their trust has been violated and you will need to acknowledge this openly. A plan will help you react more rationally. You may also need a gut-check from a trusted, outside source. This should be someone who understands the issue, but doesn't necessarily have skin in the game, who can offer objectivity about the crisis and what would constitute an appropriate response.

Saying nothing also speaks volumes. Keeping quiet or saying "no comment" may make you look guilty or like you're trying to hide something. This could elevate the crisis. The opposition will fill the void with its messaging, and you'll find yourself further on your heels.

That said, sometimes not responding is the best response. Consult the decision-making matrix (p. 10) to see if you are truly facing a crisis or just an annoying bump in the road.

Make a list of who needs to hear from you in a crisis – don't forget internal audiences such as staff and board. In fact, you should start with them so that you present a united front. Think through the timeline of the response, e.g., who to contact first, when the news could leak.

Once the crisis plan is finalized, disseminate it to members of the crisis team (along with everyone's contact information in Worksheet #5) because a crisis communication plan is no good if it's locked away during a crisis. Note that the plan should be protected because it's certainly not something you want to leak.

# The Crisis: It's Happening – or is it?



**ALL CLEAR:** If you answered no to all of the above, it is not a crisis. Worrisome or a distracting nuisance, perhaps, but not a crisis.

In situations like this, non-engagement is usually the best strategy. By not responding, you add no fuel to the opposition's fire. If you're patient, these situations usually blow over.

However, even if you determine your situation is not a crisis, you should:

1. Continue to monitor the situation closely to ensure that it does not gain momentum, especially on social media; and
2. Take the opportunity to prepare in case it does.

**YES, IT'S A CRISIS:** If you answered yes to any or all of the questions, you are likely facing a crisis. Be prepared to respond quickly and effectively, but first:

1. Gather the facts and assess the situation.
2. Convene the crisis communication team.
3. Take out the crisis plan and consider how to tailor it for the specific situation.

Use Google Alerts to get notified immediately when your organization is mentioned in the media or online. HootSuite and Topsy are good tools for monitoring social media posts. Assign a staff person to track these channels regularly.

Be careful what you put in writing. In the minutes after a problem arises, your instincts need to be on high alert. Err on the side of caution and conduct initial and all sensitive conversations in person or over the phone – not through email or printed memos.

As news breaks, you may get unsolicited communications (calls, tweets, emails, etc.) asking for seemingly innocuous pieces of information. Send all these communication requests to your designated spokesperson. **DO NOT RESPOND** even if they appear to be from friendly organizations, vendors or reporters.

# When Crisis Strikes

## Don't:

- Have a knee-jerk reaction.
- Assume a public fight is in your best interest.
- Be afraid to apologize.
- Repeat the opposition's messages.
- Forget to thank your partners, members, allies and other supporters who come to your aid during a crisis.

## Do:

- Gather facts and information about the allegation and determine credibility of the accuser or media outlet and the accusation.
- Convene crisis communication team, set assignments and timeline.
- Determine whether you are actually having a crisis.
- Pull out your crisis communication plan and turn to the appropriate scenario. Decide what should and should not be done in writing.
- Monitor media and social media sites to determine level of traction and review comments (both content and source).
- Identify who you need to communicate with; how, when and how frequently.
- Develop a planned response for internal and external audiences, including media.
- Update messaging to reflect the current situation and take into account audience and staff's emotional response.
- Determine what needs to change as a result of the crisis to minimize risk in the future.

**Remember: In the face of a crisis, being prepared is your best line of defense. If you plan ahead, you can survive even the toughest challenge. And if you need help, Spitfire is here for you. Give us a call at **202.293.6200** or **415.495.4200**. You can also send us an email at **Info@SpitfireStrategies.com**.**

If you need help assessing your current communication systems as you put your plan in place, check out **Spitfire's SmartScan**, another free online tool that will help assess where an organization is poised to be a communication powerhouse and where it has room to improve.

## Worksheet #1: Spot Vulnerabilities

Think about how the opposition might twist your vulnerabilities into attacks. Write down their potential claims in the space provided below.

Of these risks, which are the ones that have the potential to be most damaging because they are the most credible? For example, if a group is accused of being a front for the Democratic Party, and all staff and board members are Democrats with traceable political donations, it's hard to deny the claim. Mark the credibility of the threats on a 1-5 scale (1 = no merit, 5 = full of merit).

1. Claim: \_\_\_\_\_ Merit: \_\_\_\_\_
2. Claim: \_\_\_\_\_ Merit: \_\_\_\_\_
3. Claim: \_\_\_\_\_ Merit: \_\_\_\_\_
4. Claim: \_\_\_\_\_ Merit: \_\_\_\_\_
5. Claim: \_\_\_\_\_ Merit: \_\_\_\_\_

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## Worksheet #2: Identify Opposition

Who is your opposition? Use this worksheet to help create a dossier for each so that you have a clearer sense of their strengths and weaknesses. This will enable you to think about how to counter their attacks. If you have multiple sources of potential opposition, get another piece of paper and answer the questions below for each of them.

Name of Opposition Organization: \_\_\_\_\_

Describe the organization's mission:

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How strong is the group's social media presence?

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Facebook likes \_\_\_\_\_

Twitter followers \_\_\_\_\_

Tweets \_\_\_\_\_

Is the group covered frequently by the media? If yes, by mainstream media or more by conservative outlets?

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What are the group's main messages?

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What is the organization's annual budget? Who are its primary funders?

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Does the organization have a strong grassroots base?

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What other assets does the organization have?

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Has the group attacked you or others in the past? If so, what tactics did they use?

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## Worksheet #3: Assess Vulnerabilities

Identify potential vulnerabilities and what actions you can take to minimize the chance of controversy.

1. Risk: \_\_\_\_\_ Action to minimize: \_\_\_\_\_

2. Risk: \_\_\_\_\_ Action to minimize: \_\_\_\_\_

3. Risk: \_\_\_\_\_ Action to minimize: \_\_\_\_\_

4. Risk: \_\_\_\_\_ Action to minimize: \_\_\_\_\_

5. Risk: \_\_\_\_\_ Action to minimize: \_\_\_\_\_

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## Worksheet #4: Plot Assets

What are your organization's greatest strengths? Think about the opportunities outlined on page 6 and identify the ones that apply to your organization. Include any other assets your organization could leverage in a crisis.

1. Strength: \_\_\_\_\_ How to leverage: \_\_\_\_\_
2. Strength: \_\_\_\_\_ How to leverage: \_\_\_\_\_
3. Strength: \_\_\_\_\_ How to leverage: \_\_\_\_\_
4. Strength: \_\_\_\_\_ How to leverage: \_\_\_\_\_
5. Strength: \_\_\_\_\_ How to leverage: \_\_\_\_\_

Notes:

## Worksheet #5: Crisis Response Team

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

Name:  
Organization:  
Title:  
Email:  
Office phone:  
Cell phone:  
Roles/tasks responsible for:

## Worksheet #6: The Crisis Plan

Scenario: \_\_\_\_\_

Why is this a risk/how serious is it?

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What is your main message? \_\_\_\_\_

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What is the opposition's message? \_\_\_\_\_

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Target Audiences:

Who	Messenger	How	When	Frequency

Media Strategy:

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Digital Media Strategy:

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