



# Smart Plan

Spitfire's Guide  
to Crisis Prep  
& Management

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# Intro

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 chief financial officer cooks the books and embezzles money. A media outlet publishes an investigative report questioning the credibility of your organization. A member of your staff posts something harmful 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 enable 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 a challenge 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 non-profit 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.

01 STEP Assess  
Your Risk

02 STEP Assess Your  
Opposition

03 STEP Minimize  
Risk

04 STEP Minimize  
Strengths

05 STEP Your  
Team

06 STEP Your  
Response

# STEP 01 PREPARE 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 or issue have strong opposition? 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 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? (For example, a prominent equal rights advocate is revealed to have close ties to a politician under investigation for sexual harassment.)

Yes  No

Are you affiliated with organizations or communities that are frequently the target of harassment and/or disinformation campaigns by opponents or unfriendly media?

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't say; there's no HR training about sexual harassment)?

Prepare Step 01:  
**Assess Your Risk (cont.)**

**Add up the number of times  
you answered yes.**

**0-2**

**“I’ll have what she’s having.”**

You’ve found yourself in a romcom. Hijinks and some well-intentioned fumbling may occur, but you’ll (most likely) laugh your way through it and all will be well in the end. You have a plan but probably won’t need to use it.

**3-4**

**Duh-nuh. Duh-nuh.  
Duh-nuh-duh-nuh-duh-nuh-duh-nuh.**

You’re wading into the waves, and there’s a dorsal fin in the distance. Danger is lurking just under the surface. Stay out of the water, and keep that crisis plan dry and ready.

**5-6**

**“Do you like scary movies?”**

Uh oh, you’ve found yourself in a horror flick. Don’t go upstairs, don’t recheck the closet or investigate the noises in the basement. It’s already in the house. You need a plan to get outside, and you need to move quickly. Keep your crisis team on speed dial, your crisis plan updated and the car running.

# 02

STEP

PREPARE

## Assess Your Opposition or Internal Vulnerabilities

### Opposition

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

Set up Google Alerts and a social media monitoring tool like Hootsuite, Keyhole, Sprout Social or Meltwater to keep track of their activities.

If you’re dealing with well-funded and coordinated opposition, take a moment to understand the tools at its disposal so you can think ahead about the most effective strategies to counter it.

Can you anticipate the tactics your opposition will use? Is the opposition 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 its position? All of the above?

Take a look at what the opposition has done in the past because it’s the best predictor of what it 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 the opposition is up to.

### Internal Vulnerabilities

Current or potential challenges in an organization may be a risk to your brand, both internally and externally. Be mindful of those potential pitfalls, and identify them during your planning and preparation. A change in leadership, unexpected staff transition or mishandling of internal operations can bring questions about your organization’s credibility internally or damage your brand and reputation externally.

Consider what vulnerabilities you are susceptible to and may be inviting. What negative impact could that have on your organization’s brand and reputation? Is that an issue that would be damaging internally, externally or both?

Review past incidences that the organization has experienced, and assess what worked or didn’t work to quell the spread of bad news or dispel disinformation. Assess the current landscape to consider whether similar responses or actions would be relevant or whether new approaches are necessary.

### Notes

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# 03 STEP PREPARE 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 members to ensure they understand legally permissible (c)(3) and (c)(4) electoral activities. Organizations like [Bolder Advocacy](#), [Independent Sector](#) and the [National Council of Nonprofits](#) specialize in helping nonprofits understand what they can and cannot do as advocates.

### ... think the opposition or internal challenger may have you under surveillance?

Make sure your email list, website, social media accounts and events – virtual and in person – are secure.

If your organization disseminates information to email subscribers, consider including questions in the sign-up process (for instance, requiring an organization name and title or geographical location) that will help you vet people who are signing up to receive your materials. As a good rule of thumb, assume your opposition is already on your distribution lists. Regularly review your email lists, perhaps quarterly or biannually, and delete inactive or dubious accounts. Whenever you send information, review it with an eye for any language, content or context that the opposition could use against you. Make sure your website and email system are protected with the latest anti-hacking security software.

For in-person, 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 whom 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.

Stay true to your values, and make sure your abundance of caution doesn't veer into excessive or undue censorship.

### ... 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 your staff, board, partners and volunteers about any sensitive information that they should not share publicly (e.g., financial statements, funding decisions, personnel issues). Establish a conflict of interest policy for everyone close to your organization. You can find examples and best practices for these policies through the [National Council of Nonprofits](#) or [BoardSource](#).

### ... have a social media policy?

All organizations need to have a clear social media policy. There are a range of resources that offer good templates and guidance for putting one in place, including [Hootsuite](#), [Swaybase](#), [TechSoup](#) and [Tech Impact](#) (formerly Idealware) as well as the [National Association of Crisis Organization Directors](#) and [Nonprofit Risk Management Center](#). [Spitfire's Digital Smarts Guide](#) also provides

policy and strategy recommendations.

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 members 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 politically motivated lane closures on the George Washington Bridge, 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.

# STEP 04 PREPARE Maximize Strengths

If you are caught in the vortex 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 a loyal crew 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 that 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? Are you working to build your online community on Twitter, TikTok, Instagram or LinkedIn? The more engaged your social media audience is, the easier it may be to leverage support when a crisis breaks. But be careful: While an active online audience can serve as a strong line of defense and help quickly disseminate a response to accusations, allegations or attacks, many social media platforms are themselves hotbeds of misinformation, disinformation and vitriolic trolling. Learn more about countering disinformation [here](#).

## 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? Follow them on Twitter, and promote their articles that present your issue in fair and accurate ways on your feeds. Connect with them for virtual or in-person conversations to share background on the issue you work on, and invite them to press briefings so they get to know you and your organization better. Offer reporters resources and information 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.

## Example

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, and 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 PPFA 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.





# STEP 06 PLAN 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 staff. Consider conducting an external temperature check by connecting with key stakeholders. Craft messages that take into account those barriers and the current landscape. What do you want your core audience to feel when it thinks of your organization during the crisis? What do you need your target audience to believe about you and your work? If your audience is scared or concerned, 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 that openly. A plan will help you react more rationally. You may also need a gut check from a trusted, outside source. That 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.

## Plan Step 06: **Your Response (cont.)**

Saying nothing also speaks volumes. Keeping quiet or saying “no comment” may make you look guilty or like you’re trying to hide something. That 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 whether you are truly facing a crisis or just an annoying bump in the road.

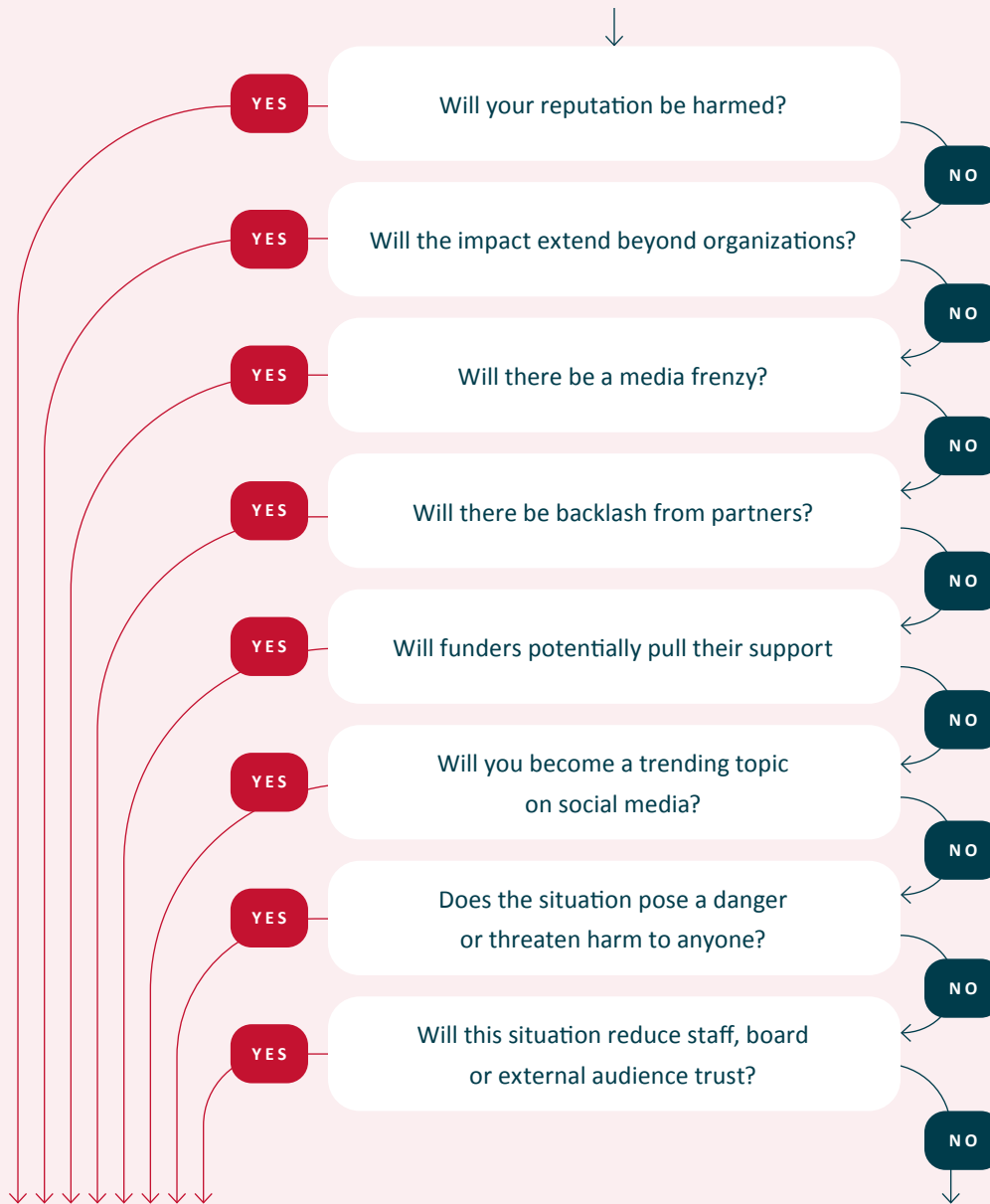
Make a list of who needs to hear from you in a crisis – don’t forget internal audiences such as staff and the board. In fact, you should start with them so that you present a united front. Think through the timeline of the response, e.g., who to contact first, when the news could leak.

Consider that the messenger is just as important as the message itself. Determine who the most credible, trustworthy and appropriate messengers will be based on the challenge you’re facing and an authentic assessment of who is set up to be a spokesperson in the moment. A crisis is likely not the time to train a brand new messenger for the organization. Also, always avoid tokenism and positioning someone as a spokesperson solely based on their identity, real or perceived. For instance, don’t set a person of color up to respond to accusations of racism if that person does not have direct responsibility or power over the specific situation at hand.

Once you have finalized the crisis plan, disseminate it to crisis team members (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?



**Ready yourself: You're in a crisis. Skip down to the "Yes, It's a Crisis" Section.**

**Congratulations, it's not a crisis! Worrisome, a distraction, a nuisance, perhaps, but not a crisis.**

# All Clear

If you answered no to all of the above, it is not a crisis. It may be worrisome or a distracting nuisance, perhaps, but not a crisis.

In situations like that, nonengagement is usually the best strategy. By not responding, you add no fuel to the opposition's fire. If you're patient, such situations usually blow over.

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

- Continue to monitor the situation closely to ensure that it does not gain momentum, especially on social media.
- 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:

- Gather the facts and assess the situation.
- Convene the crisis communication team.
- 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, Keyhole, Sprout Social and Meltwater are good tools for monitoring online and social media posts. Assign a staff person to track those 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 those 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 the crisis communication team, and 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 whom you need to communicate with and how, when and how frequently.
- Identify the most credible and appropriate messengers to speak to the issue.
- Develop a planned response for internal and external audiences, including media.
- Update messaging to reflect the current situation, and take into account your audience's and staff's emotional response.
- Meet consistently with your core crisis team to both assess ongoing issues and determine if and when a crisis has finally passed.
- Determine what needs to change as a result of the crisis to minimize risk in the future.

## Worksheet 1.

# Spot Vulnerabilities

Think about how the opposition may 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:

**Notes** \_\_\_\_\_

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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 \_\_\_\_\_

Does the media frequently cover the group? 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: \_\_\_\_\_

## Notes

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## Worksheet 4.

# Plot Assets

What are your organization's greatest strengths? Think about the opportunities outlined on p. 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

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## Worksheet 5.

# Crisis Response Team

Name:

Organization:

Title:

Email:

Office phone:

Cellphone:

Roles/tasks responsible for:

Name:

Organization:

Title:

Email:

Office phone:

Cellphone:

Roles/tasks responsible for:

Name:

Organization:

Title:

Email:

Office phone:

Cellphone:

Roles/tasks responsible for:

Name:

Organization:

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Roles/tasks responsible for:

Name:

Organization:

Title:

Email:

Office phone:

Cellphone:

Roles/tasks responsible for:

Name:

Organization:

Title:

Email:

Office phone:

Cellphone:

Roles/tasks responsible for:

# Worksheet 6.

# The Crisis Plan

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

Why is this a risk, and how serious is it?  
\_\_\_\_\_  
\_\_\_\_\_

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

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

## Target Audiences

Who	Messenger	How	When	Frequency

Media Strategy:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Digital Media Strategy:  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

# 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. Contact us [here](#), or send us an email at [info@spitfirestrategies.com](mailto:info@spitfirestrategies.com). You can also give us a call at 202.293.6200 or 415.495.4200.

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 in which areas your organization is poised to be a communication powerhouse and where it has room to improve.

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## About us

Spitfire is a woman-owned, strategic communication firm that partners with nonprofits and foundations working to make the world a better place. Spitfire's values are rooted in one core principle: Everyone belongs and has the power to spark change. Our work reflects that.

Two decades ago, Kristen Grimm was working with social-change organizations to make a difference. But she noticed that these groups were starved for fresh ways to engage and motivate people. She knew that they would thrive if they could teach their own people to think more strategically, so she started Spitfire in 2002 to do just that. Today, we're still partnering with many of those original clients, and they are still changing the world.

We work with organizations and causes that help us live our values. Whether it's standing up against racism, protecting the environment, or making good education and health a reality for more people, we are proud to stand with them. **#SpitfireProud**

People ask if we are named after the plane. We're not. The bike? No. The skateboard? Still no. We are named after Kristen. Her friends came up with the name to reflect her personality. Her fiercely passionate, pragmatic, let's-get-this-done perspective permeates the firm. She has surrounded herself with a diverse, best-in-class team of Spitfires across the country. We have many unique perspectives, and we know how to move issues in community centers and city halls, campuses and capitols, courthouses and conference rooms – in person and online. That's what a Spitfire does.

The background is a vibrant, abstract composition of overlapping, organic shapes in various colors including teal, yellow, orange, dark blue, and red. In the center, a large, multi-pointed orange starburst shape is the focal point. The text "Spark Change" is centered within this starburst in a white, serif font.

# Spark Change