

EXAMPLE CRISIS MANAGEMENT PLAYBOOK

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Crisis is inevitable for just about any type of organization, so identifying the relevant people, systems, messaging, and other standards in advance makes good business sense. Here are steps you can take in advance to maintain control:

IDENTIFY PEOPLE

Identify the Crisis Management Team

Ideally, the organization's CEO heads up the team, with the top public relations executive (or outside agency or consultant) and legal counsel acting as chief advisers. You should identify senior executives, usually the heads of major divisions, to serve as your organization's crisis communication team.

CRISIS COMMUNICATION TEAM

NAME & TITLE	ROLE & RESPONSIBILITY	CONTACT INFORMATION
Samantha Culp	School Superintendent, Winston School District	388-452-0987; sculp@winstonsd.org
Wilhelmina Bond	Assistant School Superintendent	388-453-4203; wbond@winstonsd.org
Fred Harkness	Winston High School principal	388-452-6747; fharkness@winstonsd.org
Stanley Rucinski	Winston Middle School principal	388-453-6407; srucinski@winstonsd.org
Lucy Valenzuela	Winston Elementary School principal	388-452-3338; lvalenzuela@winstonsd.org
Meredith Zimmerstein	Director of Communications, Winston School District	388-453-1404; mzimmerstein@winstonsd.org
Michael Millerson	Legal Affairs and Compliance, Winston School District	388-452-7965; mmillerson@winstonsd.org

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IDENTIFY PEOPLE continued

Identify Spokespersons

You should identify and train in advance the pool of potential spokespersons/subject matter experts, though you select the ultimate spokesperson only once the crisis breaks. Consider all the different channels of communication, both internal and external, that you may need to cover.

CRISIS SPOKESPERSONS

NAME & TITLE	EXPERTISE	CONTACT INFORMATION
Samantha Culp	District-wide events, serious issues	388-452-0987; sculp@winstonsd.org
Meredith Zimmerstein	All issues	388-453-1404; mzimmerstein@winstonsd.org
Wilhelmina Bond	Finance-related issues	388-453-4203; wbond@winstonsd.org
Michael Millerson	All issues, especially legal compliance, including privacy, disability, and special education	388-452-7965; mmillerson@winstonsd.org
Fred Harkness	Issues affecting high school	388-452-6747; fharkness@winstonsd.org
Stanley Rucinski	Issues affecting middle school	388-453-6407; srucinski@winstonsd.org
Lucy Valenzuela	Issues affecting elementary school	388-452-3338; lvalenzuela@winstonsd.org
Joseph D'Angelo	Director of Operations, snow closures, building issues, school safety	388-453-8202; jdangelo@winstonsd.org
Antoine Baxter	Director of Human Resources, personnel, health, safety	388-452-4590; abaxter@winstonsd.org

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IDENTIFY PEOPLE continued

Identify and Know Your Stakeholders

Create a complete database of internal and external stakeholders to guarantee that they obtain the exact messages you want them to hear and potentially repeat to other individuals or media outlets. Use the Smartsheet stakeholder communication plan template and update it frequently.

STAKEHOLDER COMMUNICATION PLAN

STAKEHOLDER	POWER / INTEREST	KEY INTEREST & ISSUES	COMMUNICATION VEHICLE	FREQUENCY	COMMENTS
Winston Education Association	Teachers' union	Class sizes; compensation; curriculum changes	Contract-mandated communication process; special consultation as needed	Consultation 2x a year; as needed	
Winston PTA	Parent group	All issues affecting students, education, and extracurricular activities	Principal updates, district newsletter, coffee hours	Principal updates weekly, district newsletter quarterly; coffee hours with superintendent, principals, and parents at the start of school year	Important to maintain good relations
Winston Daily Chronicle	Newspaper	Health and safety, controversies, issues with political dimensions, student success stories; weather-related school closures	Press releases, personal communication from director of communications	Press releases as warranted, at least weekly; informal contact with Winston director of communications	There is a new reporter on the education beat: Sally Thorne. They receive automated phone calls when school is cancelled or delayed due to snow.
KWST	Radio station	Weather-related school closures and delays; health and safety, controversies, issues with political dimensions, student success stories	Press releases, personal communication from director of communications	Press releases as warranted, at least weekly; informal contact with Winston director of communications	They receive automated phone calls when school is cancelled or delayed due to snow.
OSPI	State regulator for schools	Fiscal and curriculum issues, loss of student enrollment to home schooling or private schools	Required reports, informal contact with superintendent	Monthly reports; 2x a month phone contact with superintendent	

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IDENTIFY POTENTIAL CRISES AND A PLAN

Brainstorm Potential Crises in Advance

The crisis management team should identify every potential threat based on your known vulnerabilities. It may become clear that you can prevent some crisis situations by shifting existing conditions or operational methods. You should consider possible responses and best- and worst-case scenarios. Organizations are often aware of upcoming events like layoffs, mergers, or moves. In such cases, you can begin to plan well in advance of an actual event.

ADVANCE CRISIS PLANNING

POTENTIAL SCENARIOS	
	Security Breach, Product/Technology Failure, Natural Disaster, Financial Crisis, Workplace Violence, Environmental Crisis
SCENARIO 1	School shooting: We have implemented annual training for all staff on how to respond to an active shooter on a school campus, as well as procedures to limit access to school buildings and block entry of outsiders. This year we are implementing mental health screening for all students to identify potential bad actors and conducting a gun safety unit in middle school and high school health classes. Response plan involves immediate communication with law enforcement and protocol for all building occupants to lock or barricade doors and shelter in place.
SCENARIO 2	Teacher accused of sexual abuse: We have just completed heightened background check screening on all staff and are making free counseling available to all teachers. Students at all grades are receiving information on inappropriate touching and how to report abuse. If a complaint or accusation is made, legal affairs, HR and superintendent will be immediately notified by principal. Superintendent notifies law enforcement. In most cases, teacher who is accused will be placed on immediate administrative leave with full pay. Outside expert counsel (Brian Fox of Fox, McAllen and Withers in Winston City) will be called in to manage the district's legal response. No external communication will be made to respect privacy of student and teacher and rights of the accused. Superintendent and counsel will be available to meet with parents but to check first with law enforcement. HR to arrange substitute teacher.
SCENARIO 3	Pandemic spreads at school: District has activated social distancing and masking protocols. Hourly hand washing has been instituted for all staff and students. Temperature and symptom screening occurs upon entry. Students are eating lunch outdoors. Students have been grouped into cohorts of 10, and they move throughout the school day with this group. If a positive case is confirmed in a student, the student's cohort will be required to stay home and receive testing. Any teachers or specialists who work with the cohort will also stay home until receiving test results. If any cases occur outside the cluster in the same class, the entire class is quarantined at home for testing. If more cases arise in the same school building, the entire school is quarantined and distance learning is activated. Wider community spread will require canceling in-person instruction for all students in the district. First positive case will activate communication protocol with public health department and Winston Memorial Hospital. If supplies are adequate, any student or staff member will have the option of being tested. Public health authority will determine re-opening plan for school.

EXAMPLE CRISIS MANAGEMENT PLAYBOOK

IDENTIFY POTENTIAL CRISES AND A PLAN continued

ADVANCE CRISIS PLANNING

UPCOMING EVENTS Mergers, Acquisitions, Moves, Layoffs	
SCENARIO 1	<p>Decrease in tax revenue: OSPI has informed us that, due to a drop in tax revenue, class sizes will rise next year to 32 students from 26 students, staffing must be reduced by 7 percent, and district financial support will be cut by 12 percent. Each school's curriculum committee will meet to determine how to reconfigure classes at each grade level. A notice of reduction in force will be sent to the teachers' union and a seniority list compiled by HR. Assistant superintendent will lead committee, including building operations, health, safety, compliance, and administrative representatives, to look for potential cost cuts. Report will be reviewed by superintendent, then submitted to school board. A project timeline will be developed to lay out activities and due dates for all changes. Communications director to develop position papers and strategic plan for informing parents and other stakeholders.</p>
SCENARIO 2	<p>Loss of enrollment due to pandemic: We have indications that district enrollment will drop by 25 percent next year because families are opting for online schools due to the pandemic. This results in a direct funding decrease for the school district. The crisis response to this development will be merged with the initiatives in place to deal with the drop in tax revenue.</p>
SCENARIO 3	<p>Charter school opening: The effort to establish a charter school in Winston City has been gaining support. If the charter school receives a state charter, Winston School District would face an exodus of students and funding, in addition to other budgetary pressure. A committee combining teachers, parents, and administrators from all three schools and a representative from superintendent's office is being tasked with developing a plan to address the concerns of the charter school supporters and see if they can be encouraged to stay within Winston School District.</p>

EXAMPLE CRISIS MANAGEMENT PLAYBOOK

IDENTIFY POTENTIAL CRISES AND A PLAN continued

Crisis Communication Response Plan

Your brainstorming and assessment process should lead to the creation of a crisis response plan that you tailor to your organization.

CRISIS COMMUNICATION RESPONSE PLAN TEMPLATE

EVENT NAME	Pandemic spreads at school
COMMUNICATION GOAL	Reassure families and teachers that all precautions have been taken to limit spread and they can be confident students and staff will be safe.
TARGET AUDIENCES	Parents, students, teachers, other staff, media, community
ISSUE ANALYSIS & VERIFICATION	
WHAT HAPPENED?	A student tested positive
WHICH CREDIBLE INFORMATION SOURCES HAVE YOU CONFIRMED?	Parent shared official test result
WHAT ADDITIONAL FACTS DO YOU NEED TO PUT THE EVENT INTO PERSPECTIVE?	The number of contacts the student had at school, what contact has his cohort had with other students and staff in the last week, whether all safety and social distancing protocols were followed
WHEN DID IT HAPPEN?	Medical authorities say student was likely infected three to five days ago. Those were school days, but the student also practiced with his soccer team and attended a family birthday party.
WHO IS INVOLVED?	One 8 th -grade student
HOW DID IT HAPPEN?	This is being investigated, currently unclear.
WHAT IS CURRENTLY BEING DONE?	Contact tracing, notifying student's cohort and teachers, activating protocol for cohort and teachers to test and quarantine. Consultation with public health on what other steps to take. Press statement being written to provide the facts and temper public panic.

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IDENTIFY SYSTEMS

Establish Notification Systems

Set up notification systems to rapidly reach your stakeholders. Employing more than one type of communication platform (email and text, for example) greatly increases the chance of successfully disseminating the message. Using your stakeholder database, you can purchase or rent an [emergency notification system](#) to automatically contact a pre-established database.

NOTIFICATION SYSTEMS DESCRIPTION

Use our current school notification system to send texts, phone calls, and emails.

Establish Monitoring Systems

Monitoring what's being said about you on traditional and social media can alert you to negative messages that could exacerbate a crisis. Monitoring all stakeholder feedback during a crisis supports logical changes to strategy and tactics. Free services include Google Alerts and Hootsuite, but you can also use paid monitoring services to report results in various formats. Train personnel, such as customer service reps, who have front-line contact with stakeholders to immediately report to the crisis communication team.

MONITORING SYSTEMS DESCRIPTION

Communications director and assistant are monitoring media and social media, especially the Winston School Boosters Facebook group.

Establish Crisis Verification System – What, When, Who, How, and Why

The first step is to determine what has happened. Then immediately identify and document as many facts as possible based on essential questions: What happened, and have you confirmed the situation through credible information sources? What additional facts do you need to put the event into perspective? When did it happen? Who is involved? How did it happen? What is currently being done?

CRISIS VERIFICATION SYSTEM DESCRIPTION

This started with a rumor that prompted the principal to contact a student's parent. The parent confirmed the positive test, and the principal informed the parent of the need for the student to quarantine at home. Students in the same cohort were also notified and are being required to quarantine. The school district notified the public health department, which is doing contact tracing and will advise the school district of next steps. The school district will follow established protocol for quarantine of classroom, school or district-wide closures if those thresholds are reached.

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IDENTIFY MESSAGING

Develop and Use Holding Statements

You'll need to develop full messages based on the facts and that may take some time. Using these pre-determined holding statements immediately after a crisis gives you breathing space and communicates that you're aware of and working on the matter. For example, you can say, "expect a statement from our CEO within two hours" or "check Twitter or our website for updates." You should review holding statements regularly.

HOLDING STATEMENT PLANNER

- Acknowledge the crisis.
- Give yourself some time.
- Show commitment.

STATEMENT SAMPLES	DELIVERY MODALITY/MODALITIES
<p>A student at Winston Middle School has tested positive for the virus. At this time, we are gathering more information, but we can confirm the student did not attend school on Friday. The student's cohort has been notified. Further information will be shared when we know more. The student's identity will not be disclosed.</p>	<p>Radio, TV, newspaper, social media, district-wide email to families.</p>
<p>The school and school district have followed health and safety protocols, so we are hopeful that this outbreak has been contained. We are working closely with public health authorities and will provide an update when details become available.</p>	<p>Radio, TV, newspaper, social media, district-wide email to families.</p>
<p>The health department has conducted contact tracing and has advised the school district that all children in the affected student's classroom should quarantine and be tested. Their family members, especially if they are in high-risk groups, should consult their doctors about testing. Public health officials and regulators from the state office of public instruction have determined that other classrooms at Winston Middle School should continue normal operations. We will be holding an online Q&A for families with the principal and superintendent to answer your questions.</p>	<p>Radio, TV, newspaper, social media, district-wide email to families.</p>

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IDENTIFY MESSAGING continued

Key Messages

Based on verified information, the crisis communication team should aim to develop three crisis-specific messages for all stakeholders. If necessary, the team should also create some targeted messaging for specific, relevant stakeholder groups. You can modify these messages according to the nature of the actual crisis. You will also need to adapt messaging to different forms of media. For example, Twitter may require links because of its character limit.

KEY MESSAGE PLANNER

AUDIENCE	TOP THREE KEY MESSAGES	DELIVERY CHANNELS & SPOKESPERSON
ALL STAKEHOLDERS	The school and school district have adhered to all safety protocols.	Media, social media, email to all families; Stanley Rucinski, Winston Middle School principal; Samantha Culp, Winston School District superintendent
	We are working closely with public health authorities. Decisions are being made on the basis of their expertise and sound science. The top priority is the well-being of students and the community.	
	The school district will be fully transparent if more cases are found.	
TEACHERS	The school district and the administration at Winston Middle School care about your health and safety.	Consultation with teachers' union, staff email, flyers in break room, informal messaging by principal; Principal Stanley Rucinski, HR officer Antoine Baxter
	We understand this is a stressful time, and resources, including testing and counseling, are available for you.	
	Please share any concerns about the cohort system with your HR liaison, principal, and superintendent.	
FAMILIES/WINSTON PTA	We are adding more temperature checks and pre-entrance screening of students.	Online meeting, email, text messages; Superintendent Samantha Culp, Principal Stanley Rucinski, public health officer
	If you have a high-risk individual in your household, you always have the option of switching your student to distance learning.	
	Our cohort system was designed to limit your child's potential exposure to asymptomatic or presymptomatic cases. If your student is not in the affected cohort, risks are low.	
MEDIA/COMMUNITY	The school district is mindful of the risks to vulnerable people in the community and is acting responsibly.	Press releases, interviews with media outlets; Meredith Zimmerstein
	We will work closely with public health authorities.	
	We will be as transparent as possible while still meeting privacy rights of students and staff.	

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IDENTIFY KEY LEARNINGS

Post-Crisis Review

Once the crisis is over, you should implement the following best practice: The full crisis communication team should meet to conduct a formal analysis. Review what worked and what failed. Also, consider what pre-event procedures you could improve. Use the results of the formal analysis to update the crisis communication response plan.

CRISIS REVIEW FORM

STRATEGY / TACTIC	DESCRIPTION	RESULT	POSSIBLE IMPROVEMENTS
SUCCESSFUL	Informing families using a combination of text messages, emails, and automated phone calls.	Our survey showed that 94 percent of families said they had heard the news first from our official communication.	Make a holding statement sooner.
SUCCESSFUL	Our procedure for getting all students in the affected cohort tested quickly.	Within two days, we were able to communicate that there was only one other positive case in the cohort. This reassured other students in the cohort, classroom, and school, as well as staff.	Employ testing technique that provides result more quickly.
PROBLEMATIC	During crisis management, we discovered that greeters were missing some students for temperature checks at the start of the school day.	We may have missed an opportunity to catch the positive students. Also, we were not able to guarantee families that our system met the highest standards.	Add more staff for entrance screening. Greeters missed students because lines backed up and students circumvented the checkpoints because they were becoming late for class.
PROBLEMATIC	Communication with public health officer. Principal Rucinski first heard about the possible positive on a Saturday. We did not have an after-hours number for the health officer at first.	Decision and response were delayed by two hours.	Review contact information for all stakeholders and community partners, and make sure we have after-hours contact information.



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