North Carolina State University

Crisis Communications Workbook

A Step-by-Step Guide to Developing a Crisis Communications Plan

Acknowledgements

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Introduction

This workbook outlines the processes or steps involved in creating a crisis communications plan, using the Sweet Potato Industry as an example. It provides basic information, checklists and worksheets that can be adapted for your industry or organization simply by making the templates or structure fit your needs. For ease of reading and general understanding, the term "industry" is used in this workbook as a universal descriptor for any company, business or organization.

The goal of any crisis communications plan is to help an industry be prepared for an unexpected event. A plan reduces the stress of having to react in the moment and allows an industry the opportunity to be proactive and thorough in its response. The examples in this workbook are written from the perspective of a food industry – the sweet potato industry – and how it would respond if there was a foodborne illness outbreak traced back to its products.

A crisis has three phases: before, during and after – sometimes referred to as planning, crisis and recovery. Most of the creating of your communications plan will happen before a crisis begins; during the planning phase you will anticipate what could happen. During an actual crisis you will follow that plan and, in the recovery phase, you will evaluate points such as whether your plan worked well or your industry needs to build more community support.

The first seven chapters in this workbook are designated as planning, crisis or recovery phases, with each chapter representing one step of the total crisis communications plan. These chapters also contain one or more tasks for you to do, along with tips or tools to remember while you're completing the tasks. Tasks are highlighted by a "hammer" icon and tips or tools are noted with a "light bulb" icon. Examples are listed as tables throughout the first seven chapters.

Complete the workbook one chapter at a time, beginning with Chapter 1 and ending with Chapter 7. When the tasks in the first seven chapters are finished, you will have a basic crisis communications plan. Chapter 8 discusses best practices for using your communications plan, and Chapter 9 is filled with resources, including blank copies of the tables shown in the workbook that are ready for you to use.

Assemble a Team 1

A crisis is a situation that is unexpected. It interrupts normal business operations and often impacts an industry's reputation. Sometimes a crisis and its effects are localized and sometimes a crisis is international in its scope. An industry can learn that a crisis is happening from:

- its own employees
- another producer
- a regional, national or international industry association
- a lawsuit or other legal situation
- the news media
- a regulatory agency
- a customer – retailer, wholesaler, grower, shipper, consumer
- the Internet – Facebook, Twitter or other social media outlets

Having a detailed crisis communications plan ensures that you will have accurate responses for any inquiries, established accountability for any actions and minimal negative impact to your industry. A thorough plan is a combination of good imagination and professional experience; the best plans come from a group or a team.

Who's on the Team?

A crisis has no timetable; it often arrives arbitrarily and without warning. Rapid, accurate responses are a must, so it's important to have all of the key personnel on board ahead of time. The group or crisis team is usually made up of:

- a decision maker – often the CEO or someone who has the authority to make major decisions
- a spokesperson – someone who handles the media
- a message developer – someone who writes responses for all of the industry's audiences
- an internal communicator – someone who ensures that staff receive messages
- an external communicator – someone who relays information to customers
- an emergency liaison – someone who talks with law enforcement and emergency services
- a government liaison – someone who contacts government officials as needed
- an attorney – in case you need legal counsel
- an outside communications consultant – in case you need help with inquiries

If your industry is large, you may want to include representatives from Human Resources or Information Technology, too. If your industry is small, one person may hold more than one of these responsibilities. For example, the public information officer may be the message developer, the spokesperson and the external communicator. Assigning responsibilities and establishing accountability up front will save you time and aggravation when a crisis emerges.

What Does the Team Really Do?

The crisis team's biggest responsibility is actually planning for a potential crisis – creating a crisis communications plan. During a real crisis, team members will follow this communications plan and carry out their assigned roles. After the crisis has ended, the team will evaluate how well the crisis communications plan worked.

The first part of the communications plan begins with the crisis team imagining different situations and circumstances that might be described as a crisis for the industry. For example, what would happen if *Campylobacter* bacteria were found on a batch of sweet potatoes that could be traced back to North Carolina?

The team then determines the extent of the crisis – how bad is that outbreak – and who needs to know about it. Information is gathered and is ultimately shared through various communications channels. The crisis response is monitored by the team as it unfolds. Most of these steps, and the information necessary to complete them, can be anticipated in advance and make up the bulk of the plan.

Planning Activities & Tips

Create a crisis team that includes all of the people who need to be involved for the industry. Make a list of their key contact information. Identify the primary decision maker first and then list the other team members. Look at the sample in Table 1.1.

Make sure you have only one or two message developers on the crisis team. It's important for messages to be consistent, not contradictory, so have one or two people in charge of creating and seeking the necessary approval for all messages conveyed to staff, news media, officials and your customers.

Go ahead a pick a place to be your "command center" during a crisis. Start holding your crisis team meetings there and get comfortable with the space.

Once the team is in place and responsibilities are assigned, you're ready for the next planning step – learning how to assess a crisis in Chapter 2.

Table 1.1

SAMPLE CRISIS TEAM CONTACT INFORMATION

Name: JANE DOE	
Title:	CEO, Sweet Potatoes R Us
Email: work	janed@sweetpotatoesrus.org
Email: home	Janedoe1@gmail.com
Phone: work	828-123-4567 or 1-800-GO-TATER
Phone: home	828-765-4321
Phone: cell	828-250-1111
Responsibility:	Chief decision maker, primary spokesperson

Name: JOHN SMITH	
Title:	Director of Communications, Sweet Potatoes R Us
Email: work	johns@sweetpotatoesrus.org
Email: home	Johnsmith2@gmail.com
Phone: work	828-123-5678 or 1-800-GO-TATER
Phone: home	828-765-1234
Phone: cell	828-250-3456
Responsibility:	Message developer, secondary spokesperson

Name:	
Title:	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility:	

Assess the Crisis 2

Once your crisis team is in place, you are ready to begin the next planning step, which is assessing the crisis. This is simply imagining what crises your industry could face and formulating communication strategies to fit those situations. These potential crises are often referred to as “triggers” because, if and when they happen, they inevitably trigger a response. Throughout this workbook, the potential trigger of *Campylobacter* traced to sweet potatoes will be used as an example.

Planning Activities & Tips

Create a list of general triggers or potential crises for your industry. Start by identifying situations that have happened most frequently or have had the greatest impact in the past. Study the example in Table 2.1 at the bottom of this page.

Once you have developed a list of general triggers, go back and ask some questions to help flesh out the list. Answer “who, what, where, when, how and why” your industry might be involved. Follow the example in Table 2.2 on the next page.

Blank copies of all tables are located in the resource section in Chapter 9 of this workbook for you to use!

Table 2.1

LIST OF GENERAL TRIGGERS

Potential Crises for: *Sweet Potato Industry*

1	*Campylobacter* is traced to sweet potatoes at a senior center in North Carolina; residents have died and several others, including a celebrity, have been hospitalized.
2	
3	
4	
5	

Table 2.2

BASIC TRIGGER QUESTIONS
These questions answer the who, what, when, where, how and why of an event. They help you gather the information necessary to support your industry's response. Use them to flesh out each item on your list of general triggers.

1. WHAT OR WHO IS INVOLVED? (***Trigger***)
   Campylobacter traced to sweet potatoes at a senior center in North Carolina – three residents have died and several others are hospitalized. One person hospitalized is a celebrity.

2. WHEN DID YOU FIRST LEARN ABOUT THE ISSUE? HOW LONG HAS IT BEEN GOING ON? (***Timeline***)
   On Tuesday (1/12) – the Centers for Disease Control notified the sweet potato industry when the first death occurred and it appeared that sweet potatoes were involved.

3. WHO FIRST LEARNED OF THE PROBLEM? (***Initial Contact***)
   The senior center's resident physician contacted the local health department to investigate when multiple residents exhibited severe symptoms of gastrointestinal illness within a 24-hour time frame. The local health department then contacted the Centers for Disease Control.

4. WHERE IS THE EVENT UNFOLDING? STATEWIDE, IN ANOTHER STATE OR NATIONAL? (***Location***)
   The senior center is located in Asheville, North Carolina; however, celebrity involvement and the deaths of residents may fuel national interest.

5. WHY ARE YOU BEING CONTACTED? (***Relevance to your industry***)
   Sweet Potato, Inc., is the primary source for information on sweet potatoes and their production and distribution in North Carolina.

Deciding if a Trigger is an Actual Crisis

Every crisis is unique, so every crisis or trigger uses or requires different levels of communication and actual resources. It's crucial to do a quick assessment of the situation to help predict the levels of communication and resources needed. Your crisis team may need to be involved with the situation every day for several weeks or only on a few occasions.

There are several ways to gauge the level of a crisis. In this workbook, two tools will help you quickly gauge how much your industry may need to be involved and if you need outside support. The first tool is a decision tree and the second tool is a crisis assessment worksheet.

The decision tree is basically a flow chart that tells you if you're dealing with a crisis or not. If the crisis requires a proactive response, you then look at that crisis in more detail through the second tool – a crisis assessment worksheet. The worksheet is simply a scoring system that allows you to assign a numerical value to statements about the crisis. Depending on how you scored the statements, you will know how severe the crisis is.

The decision tree and the crisis assessment worksheet are valuable planning tools because they simplify decision-making about the resources and materials needed for an actual crisis. You will have an idea of where to go and what's involved before a crisis even gets started.

Planning Activities & Tips

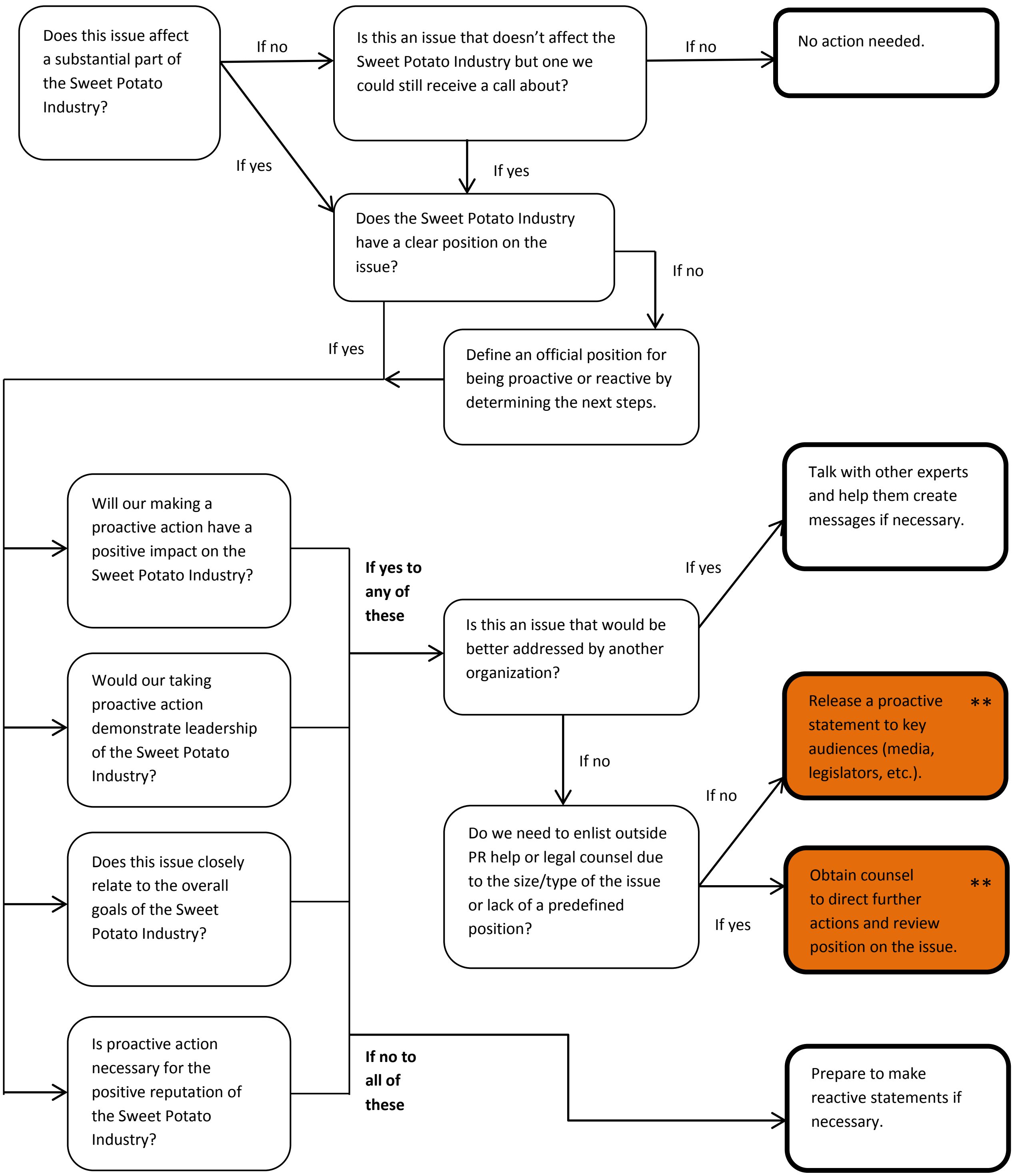
*Run the triggers you listed from Table 2.1 through the decision tree in Table 2.3. Do some of your triggers need to be addressed proactively? Only the triggers that require proactive responses (marked with double asterisks {**} on the decision tree) are the ones you need to carry forward.*

The decision tree is simply a quick reference tool that helps you decide if your trigger is a crisis at all. Don't spend a lot of time thinking about each trigger and what response it might require – the crisis assessment worksheet will give you that information.

Table 2.3

SAMPLE DECISION TREE*

General Guidelines for Deciding if a Trigger is a Crisis



This table is adapted from the Crisis Communication Plan Nonprofit Toolkit produced by the Colorado Nonprofit Association.

Crisis Assessment Worksheet

The crisis assessment worksheet, with its accompanying response matrix, is a tool that helps determine the communications response given to a potential trigger. Each trigger is given a different numerical score according to its level and intensity. This tool simplifies decision-making about resources and materials needed for an actual crisis.

Planning Activities

Take each of your triggers that required a proactive response from the decision tree in Table 2.3 and evaluate it through the crisis assessment worksheet and its accompanying response matrix in Table 2.4 and Table 2.5 – look at the samples in this chapter. ***NOTE: If you have three triggers that required a proactive response from the decision tree, you will have three crisis assessment worksheets & three response matrices – one for each trigger.***

Specific Instructions for Completing the Crisis Assessment Worksheet in *TABLE 2.4*

1. Pick one of the triggers that required a proactive response from the decision tree in *Table 2.3* and describe it in the space provided at the top of the crisis assessment worksheet in *Table 2.4*.
2. Review the crisis criteria in Column C and mark the boxes in Column A that apply to your trigger.
3. For each box checked in Column A, add up the intensity points listed in Column B to come up with the final numerical intensity score for this event.
4. Record the total intensity points in the space provided at the bottom of the worksheet.
5. Go to the accompanying Crisis Response Matrix in *Table 2.5* to rank each potential crisis or trigger "A, B, C or D."

Specific Instructions for Completing the Crisis Response Matrix in *TABLE 2.5*

1. Describe your trigger at the top of the response matrix page in *Table 2.5* (this matches the description you wrote at the top of the crisis assessment worksheet in *Table 2.4*).
2. Read the crisis criteria column on the response matrix table and confirm whether certain item numbers from the crisis assessment worksheet in *Table 2.4* have been checked. This helps you determine the ranking of the trigger as "A, B, C or D."
3. Record this letter ranking at the bottom of the response matrix page and at the bottom of the crisis assessment worksheet in *Table 2.4*.
4. The recommended outcomes column on the response matrix table outlines what action steps you need to follow. For example, a "C" trigger will have a "C" outcome response.

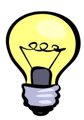
NOTES

The information gathered in the crisis assessment worksheet and response matrix is a general guideline that will help you determine *the level or priority for resources and materials* in your crisis planning. For example, if you run three triggers through the worksheet and matrix, you will have three letter rankings ("A, B, C or D") – one for each trigger. These rankings help you prioritize your responses so you can effectively target resources and materials before a crisis occurs.

This tool is meant to take only a few minutes to complete – do not spend a lot of time considering whether or not to mark a box in Column A of the crisis assessment worksheet in *Table 2.4*.

Your ultimate goal is to be able to anticipate the longevity of the initial phase of the crisis and the need for long-term maintenance and follow-up from a communications perspective. The resources and materials needed for public information and media relations, the staffing required for the crisis and the hours of operation necessary during the crisis are all affected by the intensity and longevity of the crisis.

Planning Tip



When assessing a crisis, it's important to remember that you can anticipate most negative industry situations beforehand. Take the time to develop a list of triggers and learn the potential levels of each crisis so you are one step ahead if an actual crisis occurs!

When you have listed potential triggers or crises and have put them through the crisis assessment worksheet, you're ready to move on to Chapter 3, where the next planning step is starting to identify audiences that can help you distribute messages during a crisis.

Table 2.4

SAMPLE CRISIS ASSESSMENT WORKSHEET*

Brief Description of Trigger: *Campylobacter traced to sweet potatoes at a senior center in North Carolina – death & illness confirmed, celebrity involved*

Item #	Column A Check if applicable	Column B Criteria Intensity (0-8)	Column C Crisis Criteria
1	☐	8	The initial crisis is clearly recognized as a public health emergency that requires immediate communication with the public to prevent further widespread illness or death.
2	☐	4	Deaths are expected within a short window of time (catastrophic situation). Solution and/or treatment are uncertain.
3	x	4	The media and public perceive the crisis as the "first, worst or biggest," etc.
4	☐	4	Deaths are expected well above normal levels.
5	☐	3	The crisis is occurring in a metropolitan area (w/ dense media outlets) versus a sparsely populated area (w/ fewer media outlets).
6	☐	3	The crisis is sudden, is national in scope or has the potential to have a national health impact.
7	☐	3	The government is perceived as a cause of or responsible for the crisis.
8	x	3	The crisis predominantly impacts children or previously healthy adults.
9	☐	3	The crisis is possibly "man-made" and/or deliberate.
10	☐	3	Controlling the crisis may require a suspension of civil rights for a significant portion of the population.
11	☐	3	Persons involved in the crisis must take active steps to protect their personal health and safety.
12	☐	3	Responsibility for mitigating the crisis falls within the scope of your industry.
13	☐	2	The crisis has some "exotic" aspect.
14	x	2	A well-known product, service or industry is involved.
15	☐	2	Sensitive international trade or political relations are involved.
16	x	2	A well-known "celebrity" is involved.
17	☐	2	An ongoing criminal investigation is involved.
18	x	2	The crisis or public health issue is not well understood by the general population, or the general population is misinformed about the crisis.
19	☐	2	The crisis is "acute." The crisis occurred and your industry is faced with explaining the crisis and the aftermath.
20	☐	1	The long-term health effects for humans involved in the crisis are uncertain.
21	☐	1	The crisis is evolving. Its progression is uncertain and may become more or less serious.
22	☐	1	The crisis site does not have a well-equipped and resourced public information response capability.
23	☐	0	The crisis occurred internationally with little chance of affecting the U.S. population.
24	x	0	Treatment or control of exposure is generally understood and within the person's control.

Total Intensity Points: ____13___

Crisis Level:

☐ **(A)** – Highly Intense
☐ **(B)** – Intense
X **(C)** – Moderately Intense
☐ **(D)** – Minimally Intense

**This worksheet is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

Table 2.5

SAMPLE CRISIS RESPONSE MATRIX*

Brief Description of Trigger: *Campylobacter* traced to sweet potatoes at a senior center in North Carolina – death & illness confirmed

Event Evaluation Factors			
Crisis Level	**Crisis Description**	**Crisis Criteria**	**Recommended Outcome**
A	**Highly intense in the initial phase.** The need to disseminate information rapidly to the public and media is critical. Life and limb are at risk if the public is not notified about the risk and public health recommendations.	*Item #1 must be checked on the assessment worksheet. From among items #2, 3 and 4, at least two <u>must</u> be checked.*	Operate 24 hours a day, 7 days a week for media and public response, with an understanding that relief and replacement staff will be needed. According to your plan, form or join a Joint Information Center (JIC).
B	**Intense.** The need to directly provide public health recommendations to the public and media to save live or limb is not immediate. The public and media, however, believe their health and safety are or could soon be at risk. There is a high and growing demand for more information.	*Item #1 is <u>not</u> checked on the assessment worksheet, and items #3 and 4 are checked.*	Operate 20 hours a day, 7 days a week during the initial phase. Set up routine times for media briefings, allow public to e-mail or leave phone messages during non-work times and move into maintenance phase when possible. Be prepared to face "initial phase" demands, depending on developments during the maintenance phase. May need to form a JIC.
C	**Moderately Intense.** Media frenzy develops. Interest is generated because of the crisis novelty versus a legitimate and widespread or immediate public health concern. Interest could die suddenly if a "real" crisis occurred.	*Item #3 is checked on the assessment worksheet, and items #1, 2 and 4 are <u>not</u> checked. Three or more of the Criteria Intensity 2 boxes are checked, and one or more of the Criteria Intensity 3 boxes are checked.*	Operate 10-12 hours a day, 5-6 days a week and assign a single team member for after-hour purposes during the initial phase. Operate on weekend if crisis occurs on weekend; otherwise, use on-call staff only on weekends, not during full operation. Attempt to move the media and public to maintenance phases with prescribed times and outlets for updates. No need to form a JIC.
D	**Minimally Intense.** Builds slowly and may continue for weeks, depending on the outcome of further investigation. Requires monitoring and reassessments.	*Items #1, 2 and 3 are <u>not</u> checked on the assessment worksheet. More Criteria Intensity 1 or Criteria Intensity 2 boxes are checked than Criteria Intensity 3 boxes.*	Operate normally in the initial phase while preparing to move to 24 hours a day, 7 days a week if needed. Notify relief and replacement staff that they may be called for duty depending on how the crisis develops. Do not "burn out" staff with long hours before the public and media demand escalates. Practice your crisis communication operations (during normal work hours) to ensure the system works. Consider operating a JIC if information release is shared.

Results: ____C___

**This matrix is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

Identify Audiences 3

Audiences are individuals or organizations that need to know about a crisis. They may also be able to help you disseminate information about the crisis. Audiences are different from communication channels; a channel is the method or way of reaching an audience.

If you identify your audiences before a crisis occurs, it will ensure that you choose the best channels of communication to reach them – you won't be under stress and tempted to use the first communication channel that comes to mind, which may or may not be the best one.

During a crisis, the exact audiences you contact will depend on the actual situation; however, it is absolutely critical that every audience receives consistent, approved information on regular schedules. Multiple messages going out at different times will result in confusion for everyone involved. There are six general audiences with whom you communicate during a crisis:

1. **New Media** – an audience themselves as well as a conduit to other important audiences
2. **Staff** – internal groups such as company employees, their families and colleagues
3. **Customers** – clients such as consumers, retailers, wholesalers, growers and shippers
4. **Government Officials** – national, state, regional and local officials, elected and appointed
5. **Consultants** – outside professionals that may help create messages for all audiences
6. **Trade Associations/Allied Organizations** – other groups that may need to be informed and may be able to help you

Each of your audiences will be looking for a message that is specific to them and their needs. Once your audiences are identified, it's helpful to subdivide them into levels – this is simply prioritizing who needs the message first:

- **Level 1** – the people who are immediately affected by the crisis or intimately involved in the response. They need information that allows them to take action right away because their well-being and safety depend on it.
- **Level 2** – the people who are not immediately affected by the crisis. They need facts about the crisis and information about safety measures because they are involved on a certain level.
- **Level 3** – the people who are not affected by the crisis. They still need general information about the crisis that provides reassurance and allows them to plan for their own safety, even if they're not involved.

The easiest way to begin identifying audiences is by thinking about a potential crisis and who might be affected – basically groups from the six general audiences listed above. Then, out of those affected groups, consider who might be impacted the most and prioritize them as Level 1, 2 or 3.

Planning Activities & Tips

For each crisis trigger that received a ranking ("A, B, C or D") on the crisis assessment worksheet and response matrix in Tables 2.4 and 2.5, you will have one message planning worksheet. *Look at the sample worksheet in Table 3.1.*

Describe the trigger at the top of the worksheet and identify audiences for one trigger at a time – remember to use a separate sheet for each trigger. Then determine if those audiences fit in Level 1, 2 or 3. ***FILL OUT ONLY THE "AUDIENCE & LEVEL" COLUMN AT THIS TIME;*** *you will fill out other columns on this worksheet as you move along in the planning process.*

Take your time brainstorming audiences and be generous in how many you identify – it's better to do the work now than realize in the middle of a crisis that a key group was overlooked.

Remember that you can reuse pieces of your crisis plan – e.g., audience identification for one crisis trigger may translate to another trigger. You don't have to reinvent the wheel!

When you have identified audiences and which levels they fall into for each crisis trigger, move to Chapter 4 to start developing messages.

Table 3.1

Sample Message Planning Worksheet*

Crisis: ***Campylobacter traced to sweet potatoes at a senior center in NC – deaths & illness, celebrity involved***

Audience & Level	Key Message	Supporting Facts	Communication Channel
Local Media – L1 • TV • Newspaper • Radio			
National Media – L1 • Cable News			
Internal Staff – L1			
Customers – L2			
Health Officials – L2			

**This worksheet is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

Communication Materials 4

During a crisis, people handle information differently than they do during normal times. They process information and act on it differently, using their own selective ways of hearing. People filter what they hear through their beliefs, values, patterns of behaviors, and physical and emotional states. Communication doesn't take place until people filter and decode messages, and how these messages are decoded is unique to every individual.

These unique ways of processing information make delivering clear messages during a crisis absolutely essential. A crisis doesn't unfold neatly according to a plan, so it's impossible to write detailed messages for every audience in advance. *However, generic messages can be developed that are ready to use in different situations, along with factsheets, resources and message templates that can be quickly filled in during a crisis.*

The goal of communication materials is to share information so people can make decisions or take appropriate action, as well as to establish trust and build the credibility of your industry. If you hold back information or downplay the seriousness of a crisis, you will actually add to the panic and the fear that people may feel. Behavior experts have demonstrated that people don't usually panic unless they feel trapped and helpless. Well-thought-out, thorough messages that are delivered effectively are more likely to dispel panic than create it.

Communication materials need to evolve in conjunction with the natural cycles or phases of a crisis – planning, crisis and recovery. Each phase has its own unique information requirements and moves at its own speed, depending on what triggered the crisis. Remember that all crises are not created equally, and the details of each crisis will impact your resources and staff differently.

By dividing a crisis into the phases of planning, crisis and recovery, it's much easier to anticipate the information needs of the media, key stakeholders and the general public.

Table 4.1 outlines the lifecycle of a crisis in terms of communication and identifies typical questions people ask and what information they might need.

Table 4.1

CRISIS COMMUNICATION LIFECYCLE*

	PLANNING *Pre-Crisis*	CRISIS *Initial*	CRISIS *Monitoring*	RECOVERY *Resolution*	RECOVERY *Evaluation*
Typical questions people will ask		• What happened? • Where and when? • Who's responsible? • Who's to blame? • Are we safe? • What's the danger to my family and me? • What's being done to protect or help people? • Is anyone hurt? Sick? Dead? • Who are they? • What are you going to do about it? • Who's in charge? • What's going to happen next?	• What's the risk to me? • What can I do to minimize my risk? • What should/can I do to help? • Why are you doing what you're doing? • Why aren't you doing more/differently? • Who should I listen to? Who's right?	• Why didn't the response go better/differently? • Who's responsible for getting us back to normal? • Why is it taking so long to ____? • I'm not seeing this on the news anymore. Should I still care?	
Your information goals	• Identify audiences. • Develop generic messages and materials. • Identify channels of communication. • Exercise the plan to make sure it works. • Get buy-in and approvals from legal, management. • Build relationships with audiences and media now. • Identify and train spokespeople. • Make sure employees know what to do if they're approached by the media.	• Acknowledge the crisis with empathy. • Explain and inform in simple terms about the risk. • Establish your credibility. • Provide appropriate courses of action (including where and how to get more information). • Commit to continued communication for stakeholders.	• Help appropriate people understand more accurately the impact of the situation and their risk. • Provide background and encompassing information to those who need to know. • Gain understanding of and support for response. • Monitor what's being said by whom and correct any misinformation. • Explain emergency recommendations (if any).	• Improve future response by providing education about this response. • Honestly examine problems and mishaps. • Reinforce what worked. • Persuade/build support for policy and resource allocation changes. • Promote the activities and capabilities of your industry/agency.	• Debrief and evaluate how the plan worked. • Document the response as part of an after-action report. • Take the opportunity to grow by developing an improvement plan to address training and exercise needs. • Revise the plan to incorporate changes based on lessons learned.

**This worksheet is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

Developing Messages

Now that you have an idea of what the information lifecycle looks like for a crisis, it's time to start writing and developing generic messages. It's important to keep messages clear, direct and simple by:

- Making no more than 3 key points
- Using clear, direct language
- Avoiding jargon or technical terms

Crafting messages is not hard; however, it does take time to think things through. This is why you don't want to wait until you're in the middle of a crisis to figure out what you need to say to whom.

Here's an example of a message, using the crisis from the sample message planning worksheet in *Table 3.1*. The crisis is "*Campylobacter traced to sweet potatoes at a senior center in North Carolina – deaths & illness confirmed, celebrity involved*" and was ranked as a "C" level crisis using the crisis assessment worksheet in *Table 2.4*.

The Sweet Potato Industry was probably not the first organization the media contacted when the story broke; however, that doesn't mean the industry can't be proactive in its handling of messages surrounding the event. The first audience listed from *Table 3.1* is "local media," and the initial message to media from the Sweet Potato Industry might emphasize the organization as a resource:

> Free information on how to prevent the development of campylobacteriosis, one of the most frequently reported bacterial foodborne diseases, is available from the Sweet Potato Industry on its website, www.sweetpotatoesrus.org.
>
> "This particular bacterium often shows up when proper food handling techniques are not observed," said Jane Doe, CEO of the Sweet Potato Industry. "Consumers don't need to be afraid of eating sweet potatoes or other produce; they just need to be aware of how to handle produce safely."
>
> *Campylobacter* has been traced to the recent illness outbreak reported at Happy Golden Years Retirement Center in Asheville. The Centers for Disease Control are investigating that event; consumers with questions or concerns can contact CDC at 1-800-MY-NEWS1.

In this example, the underlined portions can't be filled in until the crisis happens. Note that the message is short and answers typical "am I safe" or "where do I get more information" questions that always come early in the lifecycle of a crisis (*Table 4.1*).

Supporting Facts

Information that gives more detail and depth to a crisis is a supporting fact. As you work on developing key messages, pay attention to the natural questions that crop up during the lifecycle of a crisis (*Table 4.1*) and how you might be able to fill that gap for information. Creating factsheets or other resources are simple ways to share more information quickly and easily.

Planning Activities & Tips

Take each one of the crisis triggers identified on your sample message planning worksheet in Table 3.1 and write down key message points on the sample message planning worksheet in Table 4.2. ***NOTE: Remember if you have three crisis triggers identified, you will have three planning worksheets – one with key message points for each trigger!***

The sample message planning worksheet in Table 4.2 also has a column entitled, "Supporting Facts." Use this column to list supporting information that might accompany your initial message. ***FILL OUT ONLY THE KEY MESSAGE & SUPPORTING FACTS COLUMNS AT THIS TIME!***

Compose an initial message for your crisis trigger – keep it short and avoid jargon. Don't worry about finalizing the format now – simply write it down. Create as many messages as you have triggers.

Consider turning the information in your "Supporting Facts" column into a factsheet. Factsheets are easy to share with media and helpful for many other audiences, too. Look at Table 4.3 for an example of a factsheet.

As you develop messages, have others review the messages to make sure they're clear and direct. Reviewers can be members of your crisis team or – ideally – members of the audience the message is intended for.

Remember that you will probably be able to use a variation of the same message for multiple audiences, so don't tie yourself into knots trying to come up with something new for each audience. One message may be enough or one message with a few adjustments may do the trick.

It's normal to feel overwhelmed at this point! Complete one message for one crisis scenario for one audience at a time.

When you have developed key messages and supporting facts for the crisis scenarios listed on your message planning worksheets, move to Chapter 5 to learn about communication channels and spokesperson/media training.

Table 4.2

Sample Message Planning Worksheet

Crisis: ***Campylobacter traced to sweet potatoes at a senior center in NC – deaths & illness, celebrity involved***

Audience & Level	Key Message	Supporting Facts	Communication Channel
Local Media – L1 • Newspaper • TV • Radio	• Free information on campylobacteriosis from N.C. Sweet Potato Industry	• What is *Campylobacter*? • How is it spread? • How to reduce exposure? • How to treat it? • Common food list?	
National Media – L1 • Cable News	• Free information on campylobacteriosis from N.C. Sweet Potato Industry	• What is *Campylobacter*? • How is it spread? • How to reduce exposure? • How to treat it? • Common food list?	
Internal Staff – L1	• We are a resource for accurate information about sweet potatoes and fresh produce safety	• Additional info on fresh produce safety, plus the same info given to media	
Customers – L2	• We are a resource for accurate information about sweet potatoes and fresh produce safety	• Additional info on fresh produce safety, plus the same info given to media	
Health Officials – L2	• We are available to assist if needed • We need to be kept in the info loop	• Correct phone numbers and email addresses of health officials	

Table 4.3

SAMPLE *CAMPYLOBACTER* FACTSHEET

WHAT IS IT?

Campylobacter (pronounced 'kamp-e-lo-back-ter') is one of the most common bacterial causes of diarrheal illness in the United States. *Campylobacter jejuni* is the strain associated with most reported human infections and may be present in the body without causing noticeable illness.

WHERE IS IT FOUND?

Campylobacter organisms can be found everywhere and are commonly found in the intestinal tracts of cats, dogs, poultry, cattle, swine, rodents, monkeys, wild birds and some humans. The bacteria pass through the body in the feces and cycle through the environment. They are also found in untreated water.

WHAT HARM CAN IT CAUSE?

Infection caused by the bacteria is called campylobacteriosis and is usually caused by consuming unpasteurized milk, raw or undercooked meat or poultry, other contaminated foods and water, or contact with feces from infected animals. While the bacteria can exist in the intestinal tracts of people and animals without causing any symptoms or illness, studies show that consuming as few as 500 *Campylobacter* cells can cause the illness. Symptoms of infection usually occur within 2-10 days after the bacteria are ingested and include:

- Fever
- Abdominal cramps
- Diarrhea (often bloody)

Complications can include meningitis, urinary tract infections and possibly reactive arthritis, as well as Guillain-Barre syndrome – an unusual type of paralysis. While most people who contract campylobacteriosis recover completely within 2-5 days, some infections can be fatal, resulting in an estimated 124 deaths each year.

WHO IS MOST SUSCEPTIBLE?

Anyone may become ill from *Campylobacter*; however, infants, young children, pregnant women and their unborn babies, and older adults are at a higher risk for foodborne illnesses, as are people with weakened immune systems (cancer, diabetes, HIV/AIDS, kidney disease and transplant patients).

WHAT'S THE BEST WAY TO AVOID INFECTIONS AND MINIMIZE FOODBORNE ILLNESSES?

Improving safe food handling practices in kitchens will reduce the number of *Campylobacter* illnesses. The bacteria can be found in meat and poultry (it actually lives in the intestinal tract of healthy birds) and are often spread through cross-contamination – e.g., raw meats and poultry mix with fruits and vegetables. The bacteria are fragile and can be easily destroyed by cooking to a safe minimum temperature or passing through typical water treatment systems. Freezing cannot be relied on to destroy the bacteria at home because most home freezers are not cold enough. Best practices include:

- CLEAN – wash hands and surfaces often
- SEPARATE – don't cross-contaminate raw meats and poultry with other foods
- COOK – cook all raw meats and poultry to safe temperatures
- CHILL – refrigerate food promptly

The above information was found at the Food Safety and Inspection Service of the United States Department of Agriculture, http://www.fsis.usda.gov/Factsheets/Campylobacter_Questions_and_Answers/index.asp.
For more information about Campylobacter, see the Centers for Disease Control and Prevention (CDC) website at: http://www.cdc.gov/nczved/divisions/dfbmd/diseases/campylobacter/.

Communication Channels 5

Quality communication with your audiences relies on selecting appropriate channels of communication. A channel is simply the method or way of reaching an audience. Well-crafted messages alone won't do any good if they don't reach the intended audience.

There are many channels that can be part of your crisis communication toolbox:

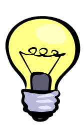
- Newspapers
- Television
- Radio
- Websites & blogs
- Social media (Twitter, e.g.)
- Printed materials
- Community meetings & forums
- Press conferences
- Combinations of all of the above or other sources

When deciding what channels to use, you need to ask:

- Which channels are most appropriate for the message?
- Which channels will the audience find credible AND accessible?
- Which channels and how many channels are realistic, considering time frame and budget?

Planning Activities & Tips

Look at the message planning worksheets you've developed (Table 4.2) and identify the most appropriate and realistic communication channel to deliver your key message to each audience listed. ***THIS IS THE LAST COLUMN TO COMPLETE!*** *Remember that each trigger you've identified on your worksheets has its own channel(s), although you may repeat the channel(s) to deliver messages to different audiences!*



Check out the pros & cons of some communication channels in the resource section of this workbook if you need more help deciding what might work best for your crisis scenario.

Table 5.1

Sample Message Planning Worksheet

Crisis: ***Campylobacter traced to sweet potatoes at senior center in NC – deaths & illnesses, celebrity involved***

Audience & Level	Key Message	Supporting Facts	Communication Channel
Local Media – L1 • Newspaper • TV • Radio	• Free information on campylobacteriosis from N.C. Sweet Potato Industry	• What is *Campylobacter*? • How is it spread? • How to reduce exposure? • How to treat it? • Common food list?	• Factsheet distributed to Citizen-Times, Channel 13 and WCQS-FM via email, phone and fax. Prepare for public media statement.
National Media – L1 • Cable News	• Free information on campylobacteriosis from N.C. Sweet Potato Industry	• What is *Campylobacter*? • How is it spread? • How to reduce exposure? • How to treat it? • Common food list?	• Factsheet distributed to Citizen-Times, Channel 13 and WCQS-FM via email, phone and fax. Prepare for public media statement.
Internal Staff – L1	• We are a resource for accurate information about sweet potatoes and fresh produce safety	• Additional info on fresh produce safety, plus the same info given to media	• Factsheet distributed internally. • Key staff identified for public comments if required.
Customers – L2	• We are a resource for accurate information about sweet potatoes and fresh produce safety	• Additional info on fresh produce safety, plus the same info given to media	• Factsheets distributed via email to customer list. • Key staff identified for customer response.
Health Care Officials – L2	• We are available to assist if needed • We need to be kept in the info loop	• Correct phone numbers and email addresses of health officials	• Key staff identified for phone contact with health officials.

Being a Spokesperson

A spokesperson is the face of the industry. He or she literally embodies the industry and gives it a human identity. A good spokesperson has the ability to connect with an audience, shares information clearly and concisely, and establishes credibility for the industry.

Attitude and nonverbal messages are important. Being calm, attentive and polite with a relaxed and neutral physical stance during a crisis are the hallmarks of a good spokesperson – feelings don't interfere with the ability to communicate positively.

Training must be provided for the people on your team that you have identified as spokespersons. They will be the "access points" that audiences come to for more information during the crisis. It is hard to remain calm and attentive in emotionally-charged situations – this is why training and practice are needed.

General Recommendations for Spokespersons:

- Know your industry's policies about the release of information
- Stay within the scope of your responsibilities and knowledge – answer factually with only what you are authorized to know
- Tell the truth – be as open as possible
- Follow up on questions or issues immediately

General Do's & Don'ts for Spokespersons:

- Do remember that jargon confuses people and implies arrogance
- Do use positive or neutral terms when possible
- Do refute negative allegations without repeating them
- Do discuss what you know, not what you think
- Don't assume you've made your point
- Don't express personal opinions
- Don't use one-liners, clichés and off-the-cuff comments
- Don't show off

Working with the Media

Media can be strong allies in getting your messages out quickly and accurately during a crisis – if you take the time in advance to understand their role and develop relationships with them. The media are an audience all by themselves, as well as a communication channel to other audiences. Regardless of whether you are the designated spokesperson or not, make every effort to accommodate media deadlines by answering requests for information as quickly as possible. Remember that today's deadlines are often timed in minutes rather than hours!

Let the media know when new information will be provided and establish a schedule for information releases. You can post information on a website or a blog or share it at a press conference where reporters have the opportunity to ask questions.

Don't play favorites with the media – give them the same access to the same information at the same time. Your goal is to have consistent information flowing back and forth among all levels of the crisis response.

In the early moments of a crisis, media operate in a "not business as usual" mode – just like you and the rest of your crisis team. The media may expect you to share information immediately. They may not verify your information completely before running a story. They may bypass your team and look to national media or scientific experts for their information.

The media has the legal right to access whatever information the general public can access, and they are not obligated to report on an event – no matter how important you think it is. The best way to manage the media is to build good relationships before a crisis occurs and to understand their roles during a crisis.

Planning Activities & Tips

Create a list of media contacts – start with the local channels that are the most likely to carry news of your industry. Expand the list to include state, regional and national contacts. Look at the sample in Table 5.2 to get started.

Take the time to meet your local media contacts in person, even if it's just for five minutes. It gives both of you an opportunity to put a face with a name. Even better, invite them out for a site visit and let them get a sense of the work you do firsthand.

When you have listed the communication channels for each of your messages and audiences, head to Chapter 6 to learn abut monitoring an actual crisis.

SAMPLE MEDIA CONTACT INFORMATION

Table 5.2

Some Newspaper	
Name	Jane Doe
Title	Environmental Reporter
Email: work	gogreen@somenewspaper.com
Email: home	gogreen@home.com
Phone: work	828-455-WORK
Phone: home	828-455-HOME
Phone: cell	828-455-CELL
Responsibility	Covers local beats that deal with environment/health issues

Some TV Station	
Name	John Doe
Title	Staff Reporter
Email: work	healthnews@sometvstation.com
Email: home	healthnews@home.com
Phone: work	828-455-WORK
Phone: home	828-455-HOME
Phone: cell	828-455-CELL
Responsibility	Covers local beats that deal with environment/health issues

Crisis 6

You have now reached the point in your crisis communications plan where most of the work has been completed – the potential crises are listed, the audiences are identified, the general messages are prepared and the communication channels are lined up. The next step is monitoring the actual crisis.

During a crisis, it's not enough to disseminate messages; you have to monitor what's being reported, said or asked by your audiences. Monitoring the crisis gives you the opportunity to:

- Spot rumors or misinformation and correct the errors before things get out of hand
- Clarify or expand your initial messages
- Help audiences understand the true nature of the crisis and any risks

Monitoring can be as simple as reading through phone messages to see what kinds of questions people are asking or as involved as having a dedicated staff member constantly watching television, radio and web-based news reports. The level of monitoring depends on the magnitude of the crisis and the type and number of audiences with whom you're communicating.

Planning Activities & Tips

Look at the different crisis scenarios you have listed on your final message planning worksheets from Table 5.1. For each crisis, write a short paragraph or list describing how you will monitor information during the crisis. Look at the example in Table 6.1 of this chapter.

Start writing a monitoring paragraph or list by working through the different rankings of crisis triggers you identified in the crisis assessment worksheet in Table 2.4. If you start with an "A" ranking first, you may be able to adapt the paragraph or list for many of the other crises you've identified – maybe even turn it into a general checklist!

Remember, just because you have implemented your plan does not mean that your work is done! Refer back to the crisis communication lifecycle in Table 4.1 to remind you of typical questions people ask and information goals you need to meet.

MONITORING THE CRISIS

Table 6.1

1. **Crisis:** *Campylobacter on sweet potatoes at a senior center in NC – deaths & illnesses, celebrity involved*
   Intensity Level: *C*

Monitor daily online versions of the Asheville Citizen-Times; listen to morning noon, and 6 p.m. broadcasts on Channel 13; and log any phone calls that come in to the Sweet Potato Industry office. Monitor national television broadcasts at 6 a.m. and 5 p.m. for continued celebrity angle; also check national websites. Do both of these for a minimum of 3 days. This should cover initial news dissemination; more time can be spent if new developments occur. Contact Department of Health for regular updates (at least once a day for 3 days).

OR …

1. **Crisis:** *Campylobacter on sweet potatoes at a senior center in NC – deaths & illnesses, celebrity involved*
   Intensity Level: *C*

- Monitor daily online versions of the Asheville Citizen-Times
- Listen to morning, noon and 6 p.m. broadcasts on Channel 13 and check website
- Log any phone calls that come in to the Sweet Potato Industry office
- Monitor national television broadcasts at 6 a.m. and 5 p.m. for continued celebrity angle; also check national websites
- Do both of these for a minimum of 3 days; this should cover initial news dissemination
- More time can be spent monitoring if new developments occur
- Contact CDC for regular updates (at least once a day for 3 days, then reassess)

Recovery 7

Every crisis gives you an opportunity to apply lessons learned. What worked well? What could have gone better? When the crisis has subsided or been reduced, the team needs to hold a debriefing and evaluate the communications plan so future responses can be improved.

Some points to evaluate include, but are not limited to:

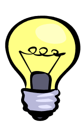
- Were the messages received and interpreted in the way the team intended?
- Did the communication channels work in the way the team expected?
- Was the crisis effectively monitored and was the response adapted as needed?

The role of communications often doesn't end at the exact moment the crisis is over. There is a good chance that the recovery phase of the crisis communication lifecycle may extend well beyond the time when everyone else has packed up and gone home.

Be prepared to begin your evaluation of the crisis, acknowledging missteps and reinforcing what worked well. It also may be appropriate to build support within your community for policy changes or promote the specific activities and capabilities of your industry.

Planning Activities & Tips

Write a short description of how post-crisis evaluation will be handled in terms of communication and include it in your plan. How will the lessons that are learned be documented and included in future crisis responses? Look at Table 7.1 for an example.



Be honest in your evaluation and don't hesitate to make changes in the plan!

Table 7.1

POST-CRISIS EVALUATION

The entire crisis team will meet as soon as the crisis has subsided or been reduced to evaluate how the existing crisis plan worked. The crisis is considered reduced when requests for information and safety considerations have decreased to normal ("before crisis") levels. The primary decision maker for the crisis team will determine when the evaluation phase begins.

The evaluation will consist of three parts:

1. **Initial Debriefing** – the entire crisis team participates, with each member bringing his or her general comments regarding the crisis and specific examples of what worked well and what needs improvement in terms of response. Needs to be held as soon as the crisis subsides or reduces while experiences are still fresh.
2. **Plan Revision** – the entire crisis team may or may not participate, depending on the outcome of the debriefing. Specific comments will turn into plan revisions and will be handled by the appropriate members of the crisis team. Needs to be completed within one month after the initial debriefing.
3. **Plan Acceptance** – the entire crisis team meets once more to go over the changes and improvements and signs off on the revised plan. Needs to be finished within two months after the initial debriefing.

The current crisis plan will be dated and will be in effect for two years from the date it was finished; at the end of two years, the crisis team will rework the plan from the beginning. The current plan will be practiced or tested at least once per calendar year, preferably in January; this includes verifying audiences and contacts, ensuring general messages are still appropriate to the industry, and confirming communications channels are current. This testing will be handled by the appropriate members of the crisis team, documented and shared with other team members, and added to the most current version of the crisis plan.

The current crisis plan will be stored on the industry computer network in the communications folder. All coordination of final updates and revisions will be the responsibility of the Communications Department on behalf of the crisis team.

Best Practices 8

Congratulations! If you have finished the activities in Chapters 1-7 of this workbook, you now have a basic crisis communications plan. Here's a review of the steps required to complete a crisis plan:

1. Assemble a Team
2. Assess the Crisis
3. Identify Audiences
4. Communication Materials
5. Communication Channels
6. Crisis
7. Recovery

All part of the planning phase

It's important to remember that a crisis plan is a flexible document that needs to change as you learn more through actual crisis experience or as your industry's focus becomes different. This is why it's important to keep your plan up-to-date and test it periodically. Some of the possible ways you can test your plan are:

- Completing desktop or tabletop assignments *(a dry run on paper)*
- Testing parts of the plan *(actually using communication channels, e.g.)*
- Engaging in full-scale exercises for a potential crisis *(act out the whole scenario as if it's real)*
- Asking targeted audiences to review and provide feedback on communication materials *(show them samples and get their reaction)*

A crisis communications plan is only as good as the effort that went into making it – take your time developing scenarios and materials in the planning phases. Creating general messages and supporting factsheets, as well as knowing who needs to receive them and in what priority, will save you time and energy when an actual crisis happens.

Make sure to use the resource section in this workbook to help you flesh out your basic crisis plan. There are blank copies of the sample forms that have been used in this book, plus phone numbers, websites and references. Don't be afraid to create your own materials – you know what your industry requires.

Resources 9

In this section there are some general resources that might be helpful to you as you develop a crisis plan. You will also find blank copies of the tables used in this workbook so you can input information unique to your industry.

General Crisis Training

- *Crisis and Emergency Risk Communications* online training program of the Centers for Disease Control and Prevention, available at http://emergency.cdc.gov/cerc/

Working with the Media

- Multiple pages from the website of the Plants for Human Health Institute at North Carolina State University, available at http://plantsforhumanhealth.ncsu.edu/extension/programs-resources/marketing-communications/crisis-communication/
- *Crisis Communications Manual and Guide for Handling the News Media* by the International Fresh-Cut Produce Association, 2005, available online at http://www2.unitedfresh.org/forms/store/ProductFormPublic/

Case Studies

- Best practices from the Centers for Disease Control, available at http://emergency.cdc.gov/cerc/bestpractices.asp

Foodborne Illness Resources

- Listing of foodborne illnesses, available at http://www.cdc.gov/foodsafety/diseases/

Important Phone Numbers

- Regional Poison Control Centers, 1-800-222-1222
- CDC Division of Bioterrorism Preparedness and Response, 404-639-0385
- CDC National Center for Environmental Health and Agency for Toxic Substances and Disease Registry, 770-488-7100
- General questions for CDC: 1-800-CDC INFO (1-800-232-4636), Monday-Friday, 8 a.m.-8 p.m.

CRISIS TEAM CONTACT INFO

Name	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

Name	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

Name	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

TRIGGERS

Potential Crises for:

1	
2	
3	
4	
5	
6	
7	
8	
9	
10	
11	
12	

BASIC TRIGGER QUESTIONS

These questions answer the who, what, when, where, how and why of an event. They help you gather the information necessary to support your industry's response. Use them to flesh out each item on your list of general triggers.

1. WHAT OR WHO IS INVOLVED? (***Trigger***)

   ____
   ____
   ____

2. WHEN DID YOU FIRST LEARN ABOUT THE ISSUE? HOW LONG HAS IT BEEN GOING ON?(***Timeline***)

   ____
   ____
   ____

3. WHO FIRST LEARNED OF THE PROBLEM? (***Initial Contact***)

   ____
   ____
   ____

4. WHERE IS THE EVENT UNFOLDING? STATEWIDE, IN ANOTHER STATE OR NATIONAL? (***Location***)

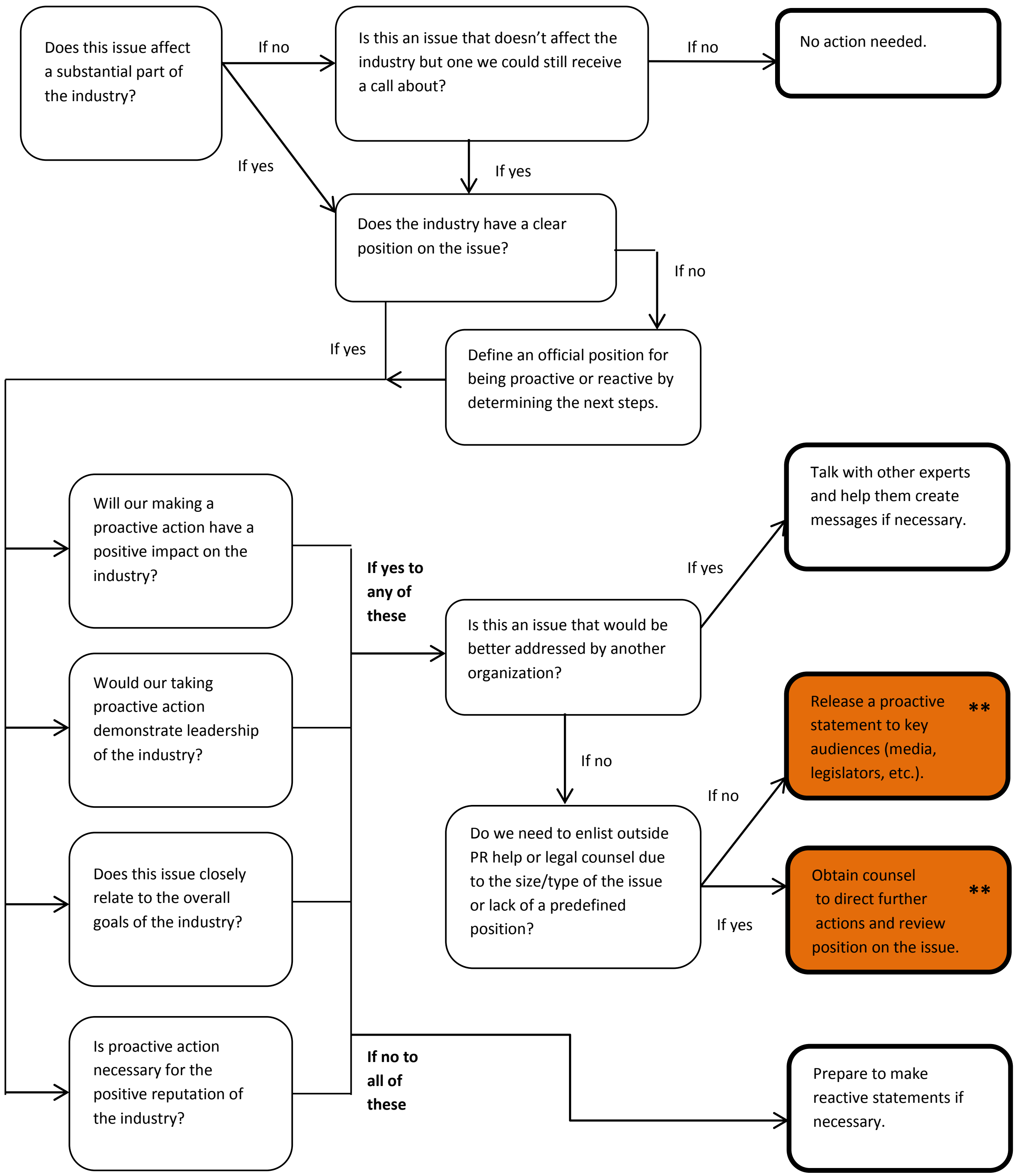
   ____
   ____
   ____
   ____

5. WHY ARE YOU BEING CONTACTED? (***Relevance to your industry***)

   ____
   ____
   ____
   ____

DECISION TREE*

General Guidelines for Deciding if a Trigger is a Crisis



This table is adapted from the Crisis Communication Plan Nonprofit Toolkit produced by the Colorado Nonprofit Association

Crisis Assessment Worksheet

The crisis assessment worksheet, with its accompanying response matrix, is a tool that helps determine the communications response given to a potential trigger. Each trigger is given a different numerical score according to its level and intensity. This tool simplifies decision-making about resources and materials needed for an actual crisis.

Specific Instructions for Completing the Worksheet

1. Pick one of the triggers that required a proactive response from the decision tree and describe it in the space provided at the top of the crisis assessment worksheet.
2. Review the crisis criteria in Column C and mark the boxes in Column A that apply to your trigger.
3. For each box checked in Column A, add up the intensity points listed in Column B to come up with the final numerical intensity score for this event.
4. Record the total intensity points in the space provided at the bottom of the worksheet.
5. Go to the accompanying crisis response matrix to rank each potential crisis or trigger “A, B, C or D.”

Specific Instructions for Completing the Response Matrix

1. Describe your trigger at the top of the response matrix page (this matches the description you wrote at the top of the crisis assessment worksheet).
2. Read the crisis criteria column on the response matrix table and confirm whether certain item numbers from the crisis assessment worksheet have been checked. This helps you determine the ranking of the trigger as “A, B, C or D.”
3. Record this letter ranking at the bottom of the response matrix page and at the bottom of the crisis assessment worksheet.
4. The recommended outcomes column on the response matrix table outlines what action steps you need to follow. For example, a “C” trigger will have a “C” outcome response.

NOTES

The information gathered in the crisis assessment worksheet and response matrix is a general guideline that will help you determine *the level or priority for resources and materials* in your crisis planning. For example, if you run three triggers through the worksheet and matrix, you will have three letter rankings (“A, B, C or D”) – one for each trigger. These rankings help you prioritize your responses.

This tool is meant to take only a few minutes to complete – do not spend a lot of time considering whether or not to check a box in Column A of the worksheet.

Your ultimate goal is to be able to anticipate the longevity of the initial phase of the crisis and the need for long-term maintenance and follow-up from a communications perspective. The resources and materials needed for public information and media relations, the staffing required for the crisis and the hours of operation necessary during the crisis are all affected by the intensity and longevity of the crisis.

CRISIS ASSESSMENT WORKSHEET*

Brief Description of Trigger:

Item #	Column A Check if applicable	Column B Criteria Intensity (0-8)	Column C Crisis Criteria
1	☐	8	The initial crisis is clearly recognized as a public health emergency that requires immediate communication with the public to prevent further widespread illness or death.
2	☐	4	Deaths are expected within a short window of time (catastrophic situation). Solution and/or treatment are uncertain.
3	☐	4	The media and public perceive the crisis as the "first, worst or biggest," etc.
4	☐	4	Deaths are expected well above normal levels.
5	☐	3	The crisis is occurring in a metropolitan area (w/ dense media outlets) versus a sparsely populated area (w/ fewer media outlets).
6	☐	3	The crisis is sudden, is national in scope or has the potential to have a national health impact.
7	☐	3	The government is perceived as a cause of or responsible for the crisis.
8	☐	3	The crisis predominantly impacts children or previously healthy adults.
9	☐	3	The crisis is possibly "man-made" and/or deliberate.
10	☐	3	Controlling the crisis may require a suspension of civil rights for a significant portion of the population.
11	☐	3	Persons involved in the crisis must take active steps to protect their personal health and safety.
12	☐	3	Responsibility for mitigating the crisis falls within the scope of your industry.
13	☐	2	The crisis has some "exotic" aspect.
14	☐	2	A well-known product, service or industry is involved.
15	☐	2	Sensitive international trade or political relations are involved.
16	☐	2	A well-known "celebrity" is involved.
17	☐	2	An ongoing criminal investigation is involved.
18	☐	2	The crisis or public health issue is not well understood by the general population, or the general population is misinformed about the crisis.
19	☐	2	The crisis is "acute." The crisis occurred and your industry is faced with explaining the crisis and the aftermath.
20	☐	1	The long-term health effects for humans involved in the crisis are uncertain.
21	☐	1	The crisis is evolving. Its progression is uncertain and may become more or less serious.
22	☐	1	The crisis site does not have a well-equipped and resourced public information response capability.
23	☐	0	The crisis occurred internationally with little chance of affecting the U.S. population.
24	☐	0	Treatment or control of exposure is generally understood and within the person's control.

Total Intensity Points: _______

Crisis Level:

☐ **(A)** – Highly Intense
☐ **(B)** – Intense
☐ **(C)** – Moderately Intense
☐ **(D)** – Minimally Intense

**This worksheet is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

CRISIS RESPONSE MATRIX*

Brief Description of Trigger:

Event Evaluation Factors			
Crisis Level	**Crisis Description**	**Crisis Criteria**	**Recommended Outcome**
A	**Highly intense in the initial phase.** The need to disseminate information rapidly to the public and media is critical. Life and limb are at risk if the public is not notified about the risk and public health recommendations.	*Item #1 must be checked on the assessment worksheet. From among items #2, 3 and 4, at least two must be checked.*	Operate 24 hours a day, 7 days a week for media and public response, with an understanding that relief and replacement staff will be needed. According to your plan, form or join a Joint Information Center (JIC).
B	**Intense.** The need to directly provide public health recommendations to the public and media to save live or limb is not immediate. The public and media, however, believe their health and safety are or could soon be at risk. There is a high and growing demand for more information.	*Item #1 is not checked on the assessment worksheet, and items #3 and 4 are checked.*	Operate 20 hours a day, 7 days a week during the initial phase. Set up routine times for media briefings, allow public to e-mail or leave phone messages during non-work times, and move into maintenance phase when possible. Be prepared to face "initial phase" demands, depending on developments during the maintenance phase. May need to form a JIC.
C	**Moderately Intense.** Media frenzy develops. Interest is generated because of the crisis novelty versus a legitimate and widespread or immediate public health concern. Interest could die suddenly if a "real" crisis occurred.	*Item #3 is checked on the assessment worksheet, and items #1, 2 and 4 are not checked. Three or more of the Criteria Intensity 2 boxes are checked, and one or more of the Criteria Intensity 3 boxes are checked.*	Operate 10-12 hours a day, 5-6 days a week and assign a single team member for after-hour purposes during the initial phase. Operate on weekend if crisis occurs on weekend; otherwise, use on-call staff only on weekends, not during full operation. Attempt to move the media and public to maintenance phases with prescribed times and outlets for updates. No need to form a JIC.
D	**Minimally Intense.** Builds slowly and may continue for weeks, depending on the outcome of further investigation. Requires monitoring and reassessments.	*Items #1, 2 and 3 are not checked on the assessment worksheet. More Criteria Intensity 1 or Criteria Intensity 2 boxes are checked than Criteria Intensity 3 boxes.*	Operate normally in the initial phase while preparing to move to 24 hours a day, 7 days a week if needed. Notify relief and replacement staff that they may be called for duty depending on how the crisis develops. Do not "burn out" staff with long hours before the public and media demand escalates. Practice your crisis communication operations (during normal work hours) to ensure the system works. Consider operating a JIC if information release is shared.

Results: _______

**This matrix is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

Message Planning Worksheet*

Crisis: ____

Audience & Level	Key Message	Supporting Facts	Communication Channel

**This worksheet is adapted from materials created by the Centers for Disease Control for its Crisis & Emergency Risk Communication Training.*

MEDIA CONTACT INFO

Media	
Contact	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

Media	
Contact	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

Media	
Contact	
Title	
Email: work	
Email: home	
Phone: work	
Phone: home	
Phone: cell	
Responsibility	

MONITORING THE CRISIS

Crisis:
Intensity Level:

____
____
____
____
____
____
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____
____
____

OR

Crisis:
Intensity Level:

-
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-
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-
-
-

POST-CRISIS EVALUATION

POSSIBLE COMMUNICATION CHANNELS*

(listed in no particular order)

Type of Channel	Benefits	Limitations
Traditional Media (television, radio, newspapers)	• Reaches many people quickly • Familiar communications vehicles for most people	• You forfeit control of the message to some degree. Media outlets may edit your message to fit their space or time limitations. • There is no guarantee that media outlets will consider your message to be “newsworthy.”
Websites A low-cost way to distribute messages fairly easily. The home page can be used to post updated information or links, and event-specific pages can be developed in advance and activated when needed.	• Allows information to be updated easily	• Generally doesn’t allow two-way interactions unless an option to ask questions by email is provided. In that case, dedicated staff may be required to handle the volume of email.
Social Networking (Twitter, Facebook, etc.) Also known as social media, these electronic communication media provide up-to-the-minute information quickly at a relatively low cost.	• Generally reaches a large number of people quickly at a low cost. • Allows monitoring of questions and concerns. • Allows two-way interaction with audience. • Lets you target and control the message.	• People must sign up to receive your messages. • Must be using social media to reach audiences before a crisis arises in order to be effective (people who are unaware of or uncomfortable with social media won’t take the time to learn it in a crisis). • Twitter is limited to very brief messages.
Blogs These popular online communication tools serve as a type of newsletter.	• Allows information to be updated easily. • Allows two-way interaction with audience.	• Must be using social media to reach audiences before a crisis arises in order to be effective (people who are unaware of or uncomfortable with social media won’t take the time to learn it in a crisis).
Newsletters A publication that informs the audience about activities, findings, health precautions and other information.	• Explains your work and findings to the audience. • Allows you to deliver a written document that the audience can keep and refer to later.	• Can backfire if the audience does not understand or is angered by what you have written. • Does not give the audience an opportunity to ask questions. • Time-consuming to prepare. • Often expensive.

**This list of communication channels is adapted from the Crisis Communication Planning Workbook of The Center for Biopreparedness Education.*

Type of Channel	Benefits	Limitations
Flyer or Factsheet A brief report summarizing current or proposed activities. Flyers are appropriate whenever new information is available.	• Provides background for information presented or discussed during a crisis or meeting.	• Requires careful writing and presentation – must make any technical information easy to understand. • Requires coordination with other message delivery.
Public Meetings A large meeting where experts present information and answer questions, and the audience can respond with questions and comments.	• Allows the audience to express concerns and the industry to present information.	• Can intensify conflicts rather than resolve controversies. If public meetings have failed in the past, use an alternative method to transmit information and obtain feedback.
Small Audience Meetings Industry staff shares information with interested audiences and state and local officials. Especially useful for keeping in touch with audiences, answering questions and clearing up misconceptions or misunderstandings.	• Allows two-way interaction with audiences.	• May require significant staff time to reach only a few audience members. • May be perceived by large audiences as an effort to limit attendance or as a tactic to prevent large audience influence. • Irate audiences may accuse your industry's staff of giving different information to different groups.
Briefings Sessions with key state and local officials, media representatives and community leaders conducted by industry staff. Used to notify of developments related to the crisis response or to introduce your industry and explain your role and work process. Not usually open to the public.	• Allows state and local officials, the media and community leaders to question your industry directly about an activity before the public release of information. • Prepares officials and community leaders to answer questions from their constituents when the information becomes public. • Allows for exchange of information and concerns.	• May become the only means of communicating with site communities. Briefings need to be complemented by activities to inform the general public, such as small audience or public meetings. • Negative feelings or bad publicity can result if some people believe they should be invited to the briefing and are not – don't exclude such people or play favorites.
Push Technology (such as Reverse 911) Used by many school systems – recorded messages are "pushed" to recipients.	• Reaches many people quickly.	• Doesn't allow two-way interaction, so messages address how questions will be answered. • Requires advance negotiation/agreement with provider of the technology.

Type of Channel	Benefits	Limitations
Phone Bank Usually employs a toll-free number people can call to get more information.	• Allows monitoring of questions and concerns. Information can be used to develop other communications. • Allows two-way interaction with audiences. • Provides a way for audiences to have questions answered quickly.	• Can be resource-intensive, especially if many people are needed to handle the call volume. • Training is need for those answering phones so they understand their roles and constraints.
Presentations Can be given to clubs, civic or faith-based organizations, school classes or similar local audiences.	• Offers the audience a chance to ask questions so the industry can gauge level of community concerns. • Reaches many people simultaneously, reducing individual inquiries.	• Can distort an audience's view of the situation if poorly presented. • Can address individual concerns of audience members only during a Q&A period following the rehearsed presentation – people can get impatient. • The presenter may face difficult or argumentative questions from the audience.
Open Houses Informal meetings where audiences can talk to industry staff one-on-one. Most appropriate when key milestones or major decisions have been reached.	• Allows for one-on-one conversation. • Helps build trust and establish rapport between audiences and industry staff.	• Can require significant staff time for planning and conducting – low turnouts won't justify the effort.
Exhibits Visual displays of maps, charts, diagrams or photographs. Can make technical information accessible and understandable.	• Stimulates public interest and understanding. • Creates visual impact and leaves a lasting impression.	• Are a one-way communication tool and don't provide an opportunity for feedback.
Audience Mailings Sends information to key contacts and concerned or involved audiences. Can announce upcoming meetings and provide advance information or serve as a follow-up for people who did not attend previous meetings.	• Delivers information quickly in writing and may require less planning time than conducting a meeting. • Particularly useful when you have straightforward, uncomplicated and noncontroversial updates for audiences. If updates require discussion or are complex, the mailing needs to augment a meeting.	• Allows no interaction or opportunity for audiences to ask questions. • Expensive. • Must keep audience addresses current.

References

The following references were consulted in the creation and development of this workbook – they were especially helpful with overall inspiration and specific tables:

- *Crisis Communication Plan Nonprofit Toolkit* of the Colorado Nonprofit Association, available online at http://jrf.org/files/Non-Profit%20Crisis%20Communication%20Plan.pdf
- *Crisis and Emergency Risk Training* of the Centers for Disease Control, both print and online training resources available at http://emergency.cdc.gov/cerc/
- *Crisis Communication Planning Workbook* of the Center for Biopreparedness Education, a joint endeavor between Creighton University Medical Center and University of Nebraska Medical Center, available online at http://www.preped.org/Resources/CrisisCommunication-Workbook.pdf