Crisis and Issues Management Playbook for Funders

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Executive Summary

This *Crisis and Issues Management Playbook* is intended as a guide to support Grantmakers In Health Funding Partners in both individual and collective approaches to crisis moments.

The health philanthropy field has been called upon to step up in extraordinary circumstances: our core mission and the people we serve are at risk, even as our own institutions are under threat. **We must be bold and forward-leaning in our work to shape an environment that facilitates our shared mission of advancing better health for all, but we must also be prepared to manage and respond appropriately to incoming challenges to our own ability to operate and to the field overall.**

This playbook serves as the starting point for management of those challenges in an effective way tailored to the situation and the level of risk. It is not intended to eliminate risk or discourage bold action; rather, it is meant to provide practical tools for assessing and managing risks in order to ensure health philanthropies can continue to operate freely amidst uncertainty.

The playbook includes:

OVERVIEW: **Crisis Communications**	How to determine whether an issue rises to the level of a crisis and guiding principles for crisis response.
QUICK-START GUIDE: **Crisis Preparedness and Response on the Fly**	Quick-start guide for crisis preparedness and response when short on time and/or resources.
IN-DEPTH: **Preparing for a Crisis**	Guidelines and a process for preparing and planning for a communications crisis.
IN-DEPTH: **Activating a Crisis Response**	How to organize your team to manage issues and respond to communications crises.
APPENDIX: **Practical Crisis Preparedness Tools**	Practical tools that can be used to guide your planning and preparedness for a crisis.
APPENDIX: **Practical Crisis Response Tools**	Practical tools that can be used in a crisis to guide your communications response.

These resources are a starting point for any crisis response. Each crisis situation is unique, and no static plan can fully anticipate the complex factors that ultimately will drive how the crisis unfolds. This playbook is designed to anticipate types of scenarios that might arise given the current political and social environment and provide resources that can be adapted to a particular potential crisis scenario.

The overriding objective of this plan is to help you rise to the occasion: to protect the ability of individual philanthropies to operate freely, and to protect the sector broadly.

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Overview: Crisis Communications

What Is a Crisis?

Simply defined, a crisis is any event or situation that poses a threat to the existence, operations, and/or reputation of an organization and demands a rapid response.

A crisis could be sparked by a single event or issue or build over time. This might include any of a range of issues, from a government investigation to a high-profile lawsuit, to data breaches, to an unexpected change in leadership, to a change in policy that may dramatically alter an organization's ability to operate.

Importantly, there are distinctions among a short-term issue, a long-term issue, and a crisis:

- **Short-Term Issue:** A negative event in the course of doing business that is resolved quickly and appropriately without extraordinary measures.

- **Long-Term Issue:** A chronic or repetitive concern that raises policy or operational considerations and could have a negative impact on the organization's success and/or reputation if not mitigated.

- **Crisis:** A development or event, either actual or perceived, that can disrupt the organization's ability to operate *(e.g., loss of funding or tax-exempt status)*, puts employees at immediate risk *(e.g., loss of jobs or jeopardy to safety)*, or threatens long-term damage to the organization's reputation.

Whether arising through a single issue or a series of cumulative events, the common thread in defining a crisis is that the situation escalates (or is likely to escalate) beyond the specific problem at hand. Instead, it threatens to reflect on the entire organization, its culture, its trustworthiness, or even its financial viability going forward. In this particular moment, we are also concerned about sector-wide impacts.

When Does an Issue Escalate to a Crisis?

It is important to understand how to determine if a situation is a crisis and to whom and how it should be escalated. A crisis can have many variables and degrees of severity. When assessing whether a situation is a crisis, consider these questions, which help assess the severity and reach of the emerging issue. **If you answer yes to one or more of them, activate your crisis response procedures.**

- ❑ Are your employees at risk of harm?

- ❑ Could the incident, or your response to it, put the organization or its ability to deliver on its mission at risk?

- ❑ Does the situation affect the ability of any part of the organization to operate?

- ❑ Does the situation have the potential to materially harm grantees or other partner organizations?

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❑ Is there potential for significant negative local, regional, national, or international media attention?

❑ Could the situation put your relationships with grantees, employees, government agencies, or the community at risk?

❑ Have the organization's information systems been compromised in any way?

❑ Is there potential for significant litigation, government investigation, or regulatory action related to the situation?

Please see the Risk Assessment Model *(p. 16-20) for a framework that can be useful in assessing the severity and reach of a crisis.*

Crisis Response Objectives

Organizations should identify their primary objectives and work toward those when developing any crisis response. Some potential objectives may include:

- Protect your reputation and license to operate.

- Protect your grantees.

- Maintain the trust of your key stakeholders.

- Help ensure accuracy and balance in any media coverage.

- Demonstrate a timely, integrated, and coordinated response, both within your organization and across the field of health philanthropy.

- Avoid statements or missteps that cause confusion, encourage criticism, or generate additional scrutiny from media, government officials, key partners, or the general public.

Typically, the best outcome following a crisis is a return to business as usual: your reputation remains unaltered, and your operations continue unabated.

Guiding Principles for Crisis Communications

In the event of an emerging issue or crisis, any responses to the public and key stakeholders should be guided by some key principles that will help inform a quick, accurate, and consistent response.

- **Be consistent:** Speak with one voice, with the same messages, in a tone that reflects the seriousness of the situation without conveying vulnerability for the organization or the sector of health philanthropy. Wherever possible, reinforce your core values.

- **Keep it simple:** Ensure that all statements stick closely to confirmed facts.

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- **Prioritize:** Not every aspect of a crisis can be handled simultaneously, and not every allegation or inquiry requires a response.

- **Be timely and be accurate:** Communicate as early as possible, while accounting for accuracy by verifying all the facts. Remember that initial responses can be updated as you learn more.

- **Stay on your front foot:** Be available and act swiftly but thoughtfully. Whenever possible, ensure that key audiences hear news from you directly—not via the media or other sources.

- **Be coordinated:** Coordinate with teams across your organization and the field, including, but not limited to, the internal communications team, legal counsel, human resources, leadership, and others.

- **Accept that "perception is reality":** In a crisis, it does not matter who is technically or legally right or wrong, or who is responsible. Be forthcoming, honest, empathetic, and proactive with all key audiences.

- **Anticipate what's next:** Stay one step ahead of the next questions and track the tone of the conversation and media coverage to help sharpen and evolve key messages.

Common Mistakes to Avoid

Crises are inherently high-pressure situations, and the stress and scrutiny can easily lead to mistakes. The most common missteps include:

- Responding too slowly, underestimating the scope or potential of the issue, or appearing to ignore the problem.

- Talking publicly without knowing the facts, which may result in having to walk back statements or correct the record, thus giving the story more attention than it otherwise would receive as inaccuracies, corrections, and updates extend the duration of coverage.

- Allowing unauthorized public commentary from your organization and/or failing to coordinate responses across stakeholders.

- Not addressing all key audiences and stakeholders, including failing to communicate with employees and internal audiences.

- Feeding the media, rather than communicating on your own terms, including providing the media with too much information or engaging in speculation.

- Repeating the negative or responding directly to every social media comment, news story, or attack.

- Failing to monitor relevant traditional and social media channels.
  (*Note: Recommendations for web, news, and social media monitoring are included in* [Basic Monitoring: Media and Social Media]*, p. 16.)*

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Crisis Preparedness and Response on the Fly

How to Prepare Before a Crisis

STEP 1
Monitor threats to your organization.

- Set up Google Alerts
- Track social media mentions
- Consider using monitoring tools to track across multiple platforms

STEP 2
Identify a crisis response team.

- Identify who can be activated in case an issue arises—your Crisis Working Group

STEP 3
Plan and prepare crisis materials.

- Prepare key messages and talking points
- Consider your stakeholders
- Develop a press list
- Draft template communications materials

Where to Start During a Crisis

STEP 1
Identify a crisis and assess your risk.

- Determine whether an issue rises to the level of a crisis
- Use a risk assessment model to determine your level of risk (i.e., low, medium, or high)

STEP 2
Activate your crisis response team.

- Alert your Crisis Working Group members and convene the team
- REMEMBER: Reach out to GIH

STEP 3
Review and verify the key facts.

- Work with the Crisis Working Group, and subject matter experts as appropriate, to gather information
- Confirm if any information is confidential and/or should not be released

STEP 4
Coordinate your crisis response.

- Determine your response strategy
- Develop (and approve) your crisis communications materials
- Distribute your crisis communications materials

STEP 5
Monitor and reassess.

- Assign someone to monitor the situation and provide regular reports
- Periodically reassess if the level of risk to the organization has escalated or cooled

Template Crisis Communications Materials

Holding Statements

- "We are proud to have served our community for the last 25 years and are grateful to partner closely with many community organizations that share our mission of improving health for all. We look forward to continuing this important work."

- "Eliminating health disparities – closing the gaps between the communities with the best health outcomes and those with the worst – is the foundation of healthy societies. That is why we target our investments in the communities with the most barriers to achieving health for all."

- "We are working with [regional/state/federal] officials to conduct an investigation and will provide more information when it is available."

- "While we cannot comment on specific personnel issues, we are committed to upholding the utmost standards of professionalism and fairness in our hiring practices."

Key Messages and Talking Points

Key Message: **We support our grantees who work to improve health for all.**

Talking Points:

- In 2024, we issued grants to XX organizations and supported XX programs/community members. We estimate that our grants led to *[insert impact]*.

- Our partnership with *[organization]* has helped reduce the number of uninsured people in *[insert locality]* over the last decade.

- In response to the funding crisis affecting many community organizations due to reduced support from the Federal government, we have *[insert actions]*.

FAQs and Tough Questions

- *FAQ:* How do you make decisions about which organizations to support and at what levels?

- *Tough question:* During this difficult time for community organizations, why haven't you decided to increase your annual payout? How are you stepping up to support the community?

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Internal (Employee / Board) Email or Letter

We are closely monitoring *[insert crisis/situation]*. In response, we are/intend to *[insert next steps, if known / internal response strategy]*. As a reminder, if you receive any external inquiries, whether from the media or from a grantee or member of the community, please send them to *[Comms lead]*, who is coordinating our responses. Above all, we remain committed to our vision of *[insert vision / mission / key message]*.

Letter / Newsletter to Grantees

At *[Funding Partner]*, we are closely monitoring *[insert crisis/situation]*. In response, we are/intend to *[insert next steps, if known / external response strategy]*. We are also here to support all our grantees as you continue your critical work to improve the health of our *[local / regional / state / national]* communities.

- *[Insert support details, if applicable]*

Now more than ever, we remain committed to our vision of *[insert vision / mission / key message]*.

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In-Depth: Preparing for a Crisis

Step 1: Monitor threats to your organization.

The first step in detecting a brewing threat to your organization is monitoring. Use Google Alerts, track social media mentions, or use paid monitoring tools, like Meltwater or Brandwatch, to keep track of potential threats to your organization.

Step 2: Identify a crisis response team.

In advance of any crisis situation, Crisis Working Groups should be created within the organization and across the field. Think of this as a more sophisticated version of a phone tree, or a way to quickly know who to contact and what roles they will play as a crisis develops. During the crisis, the working group is charged with driving a response strategy, assembling teams, gathering resources, drafting responses, and routing them through appropriate leadership and/or approvals (if applicable), and disseminating final responses.

The working group should designate a "Crisis Leader" who will convene the team during a crisis and oversee the development of a response. The working group should be diverse, including a mix of executive leadership, communications staff, legal counsel, crisis and issues management teams, and other relevant groups who can support crisis response, as the size of an organization's staff allows. It should also include members with subject matter expertise so that the group is prepared to respond to a wide variety of issues. The Crisis Leader and active members of the working group may vary depending on the nature of the crisis.

Step 3: Plan and prepare crisis materials.

The crisis working group must remain adaptable to the fluid nature of crisis scenarios, meaning that communicators ought to be agile enough to change their approach as a crisis develops. Despite the inherent unknowns of a crisis that require quick assessment and reaction by the crisis communicators, there are several ways to prepare that can streamline the process for when a crisis does occur and increase the flexibility the team will have in developing and implementing a response. These proactive steps include:

1. **Develop a rapid response mechanism with a streamlined approval process.** Given that time will be scarce when a crisis arises, determine in advance who will need to sign off on any external or internal communication, including reaching out to media.

2. **Maintain up-to-date contact lists of key stakeholders.** These key contacts should include:

   - Crisis working group members

   - Employees

   - Grantees and donors

   - Media (press list)

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- Relevant third-party and external organizations

- Key regulatory and other government officials

- Legal counsel (if applicable)

3. **Develop crisis scenarios.** Begin with scenarios you believe are most likely to emerge at this moment, or other challenging scenarios that could threaten your reputation or ability to operate. This can be done simply—by polling senior team members—or through a more consultative process with different departments and outside stakeholders.

4. **Draft a detailed rollout plan for all communications activities.** Sample plans and content should be developed for as many of the crisis scenarios as possible. Each plan should define the sequence of communications and identify who is responsible for each element. It also should include a specific cascade for internal communications.

5. **Identify key spokespersons.** While separate spokespeople may be designated for various external and internal audiences, the number of spokespeople should be kept as small as possible to ensure consistency in message delivery.

6. **Conduct media training for spokespeople.** Interacting effectively with the media does not come naturally to most people. Designated spokespeople must be trained in advance on techniques to enhance successful delivery of the organization's messages and pitfalls to avoid.

7. **Draft a suite of template communications materials.** Although all communications materials will need to be tailored to the specifics of each crisis situation, having template materials corresponding to a selection of crisis scenarios can give you a critical head start. The materials could include:

- Draft holding statements *(a short, concise external statement that can be issued to media and/or externally in the event of a crisis or as a story is breaking)*

- Key messages for your organization

- Talking points *(segmented by audience)*

- FAQs *(to outline basic information about the issue)* and tough Q&A *(to prepare responses to the questions you hope are not asked)*

- Internal (employee / board) email or letter

- Letter/newsletter to grantees

In-Depth: Activating a Crisis Response

Step 1: Identify a crisis and assess your risk.

Not all crises begin in the same way. **Your first step when an issue arises is to determine if the situation is a crisis.** Not all negative events are crises, so not all will require engaging the full working group. When faced with an apparent issue or budding crisis, each member of the working group must be prepared to notify an appropriate point of contact, depending on the severity of the issue and its potential to become a crisis.

Use the key questions from *When Does an Issue Escalate to a Crisis?* *(p. 4-5)* and your preferred *Risk Assessment Model* *(p. 16-19)* to determine if the issue has escalated to the level of a crisis. If yes, marshal a crisis response and engage your Crisis Working Group.

Step 2: Activate your crisis response team.

When a crisis arises, the Crisis Working Group's first step is to review and confirm all the information that has been collected about the situation. Subsequently, it is the working group's job to determine potential nuances, vulnerabilities, and the stakeholders affected, and then to develop a communications plan to address these audiences.

Step 3: Review and verify the key facts.

Obtain as much information as possible to equip the working group to make a strong crisis communications plan that addresses the current moment. Beyond close engagement with internal groups and external stakeholders, this may include connecting with legal counsel or gathering intel from third-party organizations. Take care not to over-analyze the situation to the point of inaction or insufficiently prompt action.

Step 4: Coordinate your crisis response.

When an event occurs, use the following process to plan and implement a crisis response:

1. **Implement specific communications procedures for the crisis.** Inform all relevant stakeholders, internal and external, to ensure everyone is working in concert, particularly if you perceive a broader threat to your community partners or to the sector. Depending on the severity and sensitivity of the crisis, it may be necessary to limit outside responses to inquiries relating to the crisis, and instead direct inquiries to a designated communications lead on the Crisis Working Group.

2. **Assess the time limitations.** Determine what level of response can be realistically developed within the time frame dictated by the nature of the crisis. If you do not yet have full information about the crisis, it may be necessary to release a holding statement while conducting an investigation or gathering more information, followed by a more expansive response in the future once the facts are known. Set clear deadlines for decisions and meet them.

3. **Assess the real or potential impact on your organization.** This can include both direct impacts on areas like funding sources or license to operate, as well as changed perceptions of your organization or the health philanthropy sector among your key

audiences. Moreover, any external-facing units should be notified, and any external reactions to the crisis should be collected and assessed.

4. **Identify key audiences.** Determine which of your stakeholders are impacted by the issue in order to ensure that the response communicates to them directly. These may include communications to employees, grantees, donors, community members, government officials/regulators/law enforcement, the media, and others.

5. **Establish points of contact for external and internal stakeholders.** Determine who the point of contact should be for each relevant audience and include appropriate contact information in communications.

6. **Identify key themes and messages.** Carefully review and modify template themes and key messages to meet actual needs when a crisis arises. These themes and messages should be sharply focused and consistent with all actions being taken by your organization to respond to the crisis, aligned with actions that others may take, and consistent with your organization's core values. It is critical that the messages establish the appropriate tone *(e.g., appropriately concerned but not alarmist, firm in one's convictions but not preachy)* driven by the facts and your strategic interests and objectives.

7. **Develop communications materials.** All materials, whether original or based on pre-drafted templates, should build on the key themes and messages developed specifically for the crisis and be closely aligned. Importantly, avoid blanket, unconditional statements that limit your options to act or that might be contradicted by subsequent events *(i.e., we will never [insert action])*. In almost all cases, communications materials should include key messages and talking points for use by spokespeople; media holding statements; and FAQs or a tough Q&A. Most of these will not be released publicly but will inform your public communications.

Formulating an Initial Statement

If the situation warrants one, the initial public statement is vital to setting the appropriate tone and establishing the organization and/or the sector's public stance on the crisis. It will also help establish the key facts and could impact the potential evolution of the situation. Your goal is to present a statement that is brief, clear, and true to both your values and the next steps the organization is taking to move forward. In crafting this first statement, consider the following:

- **Always consider how each relevant audience will react to your statements and actions.** What are the immediate and long-term consequences? For example, would a statement calm lawmakers or regulators but anger or create doubt among certain key partners or grantees? **BUT:** Don't over-analyze; this is just the first of many communications.

- **Determine whether you should wait to respond to a media inquiry or proactively get ahead of the impending story with approved messaging.** For example, if the crisis could result in a public demonstration or press conference called by a public official, a proactive approach may give you better control over the story from the very start.

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- **Determine if the situation calls for an oral or written statement.** Providing a written statement from the organization is likely to signal the situation is being taken more seriously than if a spokesperson simply talks to reporters. A written statement also helps to limit the possibility that your position might be distorted.

- **Select the most appropriate spokesperson(s).** A single spokesperson throughout a crisis can help establish credibility, trust and rapport with the media, while ensuring consistency. However, many spokespersons speaking from a similar set of messages can indicate cohesion and alignment across the sector. In a long-running crisis, many spokespersons may be required to respond to a large volume of inquiries or to deliver different messages, such as a broader message on philanthropy, a more specific community message by grantees in particular geographies, or an advocacy message to policymakers from an impacted community member.

- **During the early stages of a crisis, stick with the initial statement.** By elaborating or releasing additional information too soon, you may risk confusing media and other audiences—unless, of course, new information makes it necessary to amend or add to the statement. As a more proactive tactic, sharing updates to a statement can generate new "news" or attention to the story.

  - *Example initial statement:* "We are working with [regional/state/federal] officials to conduct an investigation and will provide more information when it is available."

  - *Example follow-up statement:* "Following the investigation, we learned [insert information]. Our next steps are [insert next steps]."

- **Communicate your position consistently,** even when answering questions or facing an agenda, as dictated by the media, regulators, community leaders, or appointed and elected officials. While making every effort to be seen as responsive and forthcoming, stay focused on opportunities that allow you to put your messaging into the coverage.

- **Keep your key values in mind.** While you may not have all the necessary facts immediately, an initial statement can articulate the values that are going to guide your response to the situation.

Step 5: Monitor and reassess.

Once the working group has mobilized in response to the crisis, it will need to continue to monitor and adapt to what is often a rapidly changing environment. It is necessary to reevaluate the situation continually and take action as warranted. Key elements of an ongoing crisis response include:

- **Monitor in real time** key traditional and social media sources and swiftly disseminate coverage to the Crisis Working Group. An aggressive effort should be made to gather all relevant information from your stakeholders and also to assess the strategic value, tactical significance, and potential impact of any new information.

  - Perhaps just as important as gathering information is an understanding that all the facts may not yet be available. Given that likelihood, the crisis response should be designed to be able to accommodate new information as it emerges.

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- **Determine whether any current communications or activities should be suspended pending a resolution of the crisis** *(e.g., planned announcements, events)*. Judge whether these activities could clash with the key themes and messages used to manage the crisis or otherwise reflect negatively on the organization or the sector in the midst of the crisis.

- **Identify credible third parties who can affirm your position or place the crisis in context.** These could include board members, community or philanthropic sector partners, grantees, outside experts, or academics.

- **Consider an interim response.** If the initial crisis response is not moving forward as quickly as desired, you may consider announcing an interim policy or operational change pending the resolution of the situation.

At any point in this process, you may need to move back to a previous step based on new information, timing constraints, or other shifts as the crisis develops. A successful crisis response is one that is flexible, fast, and responsive to the moment *as it is*, not as we wish it were.

Moving Beyond the Immediate Crisis

As the immediate crisis passes, there will be several follow-up activities to stay on top of the situation and ensure that the effects remain contained. These will include:

- **Conduct additional stakeholder and/or media outreach.** The crisis team should update core audiences as new information becomes available; this allows you greater control over the flow of information.

- **Attempt to achieve closure on the crisis.** Acknowledge and communicate to all parties that the problem is under control. Identify third-party supporters who can substantiate and speak to the successful conclusion of the crisis.

- **Conduct a "post-mortem."** After the crisis has been resolved (or has de-escalated to a lower risk category), a situation analysis can provide an accurate assessment of the organization's response, which can help determine long-term strategic needs and any required adjustments to the crisis preparation and response plan and protocols. Key elements include:

  o Acknowledging and thanking those who assisted in managing the crisis.

  o Debriefing leadership and objectively assessing performance, from strengths in the process to areas for improvement.

  o Revising future approaches and communications materials, as warranted.

- **Continue monitoring.** Even if the immediate threat has passed, it is important to set up and/or maintain a regular monitoring system so that you are not caught off guard for the next issue that arises. Refine search terms and outlets to watch based on learnings from the previous crisis moment.

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Appendix: Practical Crisis Preparedness Tools

Basic Monitoring: Media and Social Media

The first step in detecting a brewing threat to your organization is monitoring, and there are a variety of free and paid tools you can use to get started.

- **Google Alerts:** Set up free alerts to track web and news mentions of your organization, your CEO, influential board members, a selection of your grantees; and key terms. Set up alerts on a daily basis for regular monitoring, or "as-it-happens" in crisis moments.

- **Social Media:** Find ways to track how your external voices are speaking about your organization on social media, whether you have a presence on the platform or not.

  - **For free** *(on platforms where you have a presence)***:** Manually search for keywords on the platform's search bar or set up private lists of accounts or search terms to monitor. Closely monitor your own handles, as they will be notified if you are tagged in a post.

  - **For a fee** *(on certain platforms)***:** Alternatively, there are fee-based social monitoring tools: X Pro (formerly TweetDeck) is relatively inexpensive (but only specific to X), whereas tools such as Meltwater, Hootsuite, Sprout Social, Brandwatch, or Critical Mention are more expensive (and expansive).

Risk Assessment Model

A crisis **poses a direct reputational threat to the organization or threatens the organization's ability to effectively operate.** It has the potential to result in lasting harm, including loss of support and/or trust among key stakeholders; operational disruption; legal, regulatory, or legislative action targeting the organization; and/or a significant blow to the organization's financial health.

While any negative issue, storyline, or attention has impact and can feel stressful and meaningful, it is critical to distinguish between a risk scenario or challenge that is frustrating, and one that is a true crisis with potential to significantly harm the organization's reputation and ability to function over the long term.

Classifying risk can be helpful in determining how an organization should respond in handling the matter. To assess the issue and true level of crisis, first determine the **severity** and the **reach** of the challenge.

Severity

- Topic of storyline *(e.g., exposure of a vulnerability or accusation, revelations hit on core functionality, mission or values)*

- How/whether stakeholders react and/or if criticism or attention is coming from a particularly key audience *(e.g., how we internally view the story and how others are viewing it via social/traditional media)*
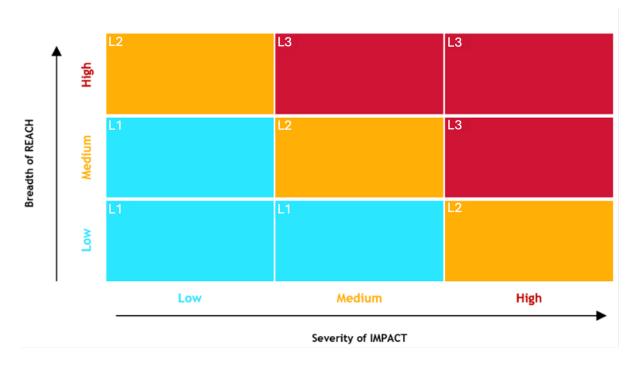
- How does the narrative and do the developments escalate *(e.g., are grantees and partners refusing to work with you? Are there follow-up stories/angles, and are they exposing new details? Is there a risk of litigation or policymaker attention? Does it put anyone at risk of physical harm?)*

- Focus of the criticism/conversation *(e.g. is the organization targeted in a way that threatens staff, board, or donor confidence?)*

Reach

- Influence of publication *(e.g., local vs. national, mainstream vs. partisan media, niche aimed at key stakeholders vs. general public)*

- Volume of chatter *(e.g., how many inquiries are you receiving from the media? are many people discussing this on social media? Are employees/grantees/advocacy groups reaching out to you or to your board members?)*

- Duration of publicity *(e.g., is it intensifying rather than dying down?)*

- External environment *(e.g., are other news stories, issues or developments—such as policy or legislative debates and processes—dominating the conversation and/or media coverage or could they heighten the risk?)*

The following tool, which considers the reach and severity of an issue, can be used to help assess and inform the appropriate level of response and assign a category of risk:

Outlined next are general definitions of Low (L1), Medium (L2), and High (L3) issues, followed by examples of issues that could fall into each category. Your assessment of severity and reach—and the subsequent risk level—will help you determine and calibrate your response.

(Note: It is important to continue reevaluating the level of risk as the situation develops.)

Risk	Description	Example Scenarios
Low (L1): **An issue that can be managed in the ordinary course of business.**	May not require an immediate response. Unlikely to require a public or proactive response. • May not currently be a crisis but has the potential to evolve into one if not addressed in a timely and appropriate manner. • Does not require cross-functional response (can be handled by a single function or person in the organization). • Negative immediate impact is limited, and long-term risk is negligible.	• Inquiry from a small, obscure media outlet. • An individual, employee, or external activist expresses concerns about certain policies or actions on social media. • A grantee or donor asks for clarification of certain policies.
Medium (L2): **A serious issue that requires a timely or immediate, cross-functional response.**	May require a public response. • Has potential to attract significant negative media attention. • The issue is already receiving attention in the public domain. • Could result in significant legal, regulatory, or reputational jeopardy. • As a high-risk situation de-escalates, evolving details and criticism may still linger, meaning some news coverage and risk lingers too.	• A disgruntled group of grantees speaks to the media about alleged discrimination at an organization. • An organization is the topic of an episode of a popular podcast that makes false allegations about its programs or grantees, which begins to gain some viral attention. • A local, state, or federal lawmaker inquires about some aspect of the organization's activity in an unfriendly manner or alleges wrongdoing.

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Risk	Description	Example Scenarios
High (L3): **A very serious issue that poses a direct threat to reputation, brand, or ability to operate.**	Requires full-scale response and should be used to describe the most pressing issues. Will almost definitely require public engagement. • A delay in action or response could significantly impact the organization's reputation or ability to operate, or could result in litigation, sanctions, or investigation from government entities. • Sustained and intense negative media coverage and robust social media discussions that threaten organization or key grantees. • Incident alienates key donors, board members, or community partners in a way that could have a material, financial impact on the organization.	• A former grantee or disgruntled community partner files a lawsuit against the organization alleging discrimination. • IRS launches an investigation into the tax-exempt status of an organization. • Legislation is introduced at the local, state, or federal level that threatens the organization's funding or ability to operate.

Scenario Mapping

No one can predict a crisis or plan for every eventuality, but we can consider the most likely threats and create a framework against which to base our efforts in the face of a crisis.

Each organization will need to assess potential crisis scenarios for itself, but given the threats to philanthropy at this moment, and based on threats posed to similar organizations over time, it is prudent to begin with several categories of scenarios:

1. **Nonprofit status:** A challenge to the tax-exempt status of nonprofit organizations, whether to individual organizations or on a broader scale.

2. **Financial issue:** Disruption to funding mechanisms or financial systems that impacts the ability to operate, or that erodes trust in organizations and/or the field to be a good steward of money.

3. **Political issue:** Attention from a policymaker or regulator focused on a social/political issue that gains traction and impacts ability to operate (i.e., health equity, federal agencies' list of organizations conducting "illegal DEI" activities).

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4. **Lawsuit:** Lawsuit filed by federal and/or state governments, grantees, communities, employees, or activists on behalf of outside interests.

5. **Cybersecurity:** Breach of data (e.g., Ransomware attack), or temporary or indefinite failure of critical IT systems (e.g., grant distribution system outage)

6. **HR/Workforce Issue:** Internal HR issues that affect organizational functions (i.e., executive departures, layoffs, staffing shortages).

Please note that actual responses will depend heavily on the specifics of each situation.

Sample Organization-Specific Scenario

CRISIS SCENARIO: *Political Issue*	**Organization is listed on the "illegal DEI" list submitted from federal agencies in May/June 2025; potential to escalate into federal investigation.**	
Communications Imperative	Ensure accurate information about the organization's activities. Reinforce organization's core values and role in the community. Reassure funders and community partners. Shield grantees from harm. Reduce possibility of further action/policymaker attention.	
Experts	• Chief Executive Officer • Chief Programs Officer • General Counsel • Advocacy/policy officer	• Board Chair • Sector or peer organization leadership • Outside Counsel
Key Facts / Questions to Answer	• What is the next step, and the timeline for a response? • How could this threaten the organization—Funding? Tax status? Negative publicity? • How does this affect grantees? Does this affect other partnerships or projects? • Have other sector peers contended with similar attacks? If so, how did they respond?	
Key Voices to Watch	• Local and/or regional media • Trade outlets: Philanthropy, Finance, Health care	• Government: Policymakers, Regulators (local, state, federal) • Social media

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CRISIS SCENARIO: *Political Issue*	Organization is listed on the "illegal DEI" list submitted from federal agencies in May/June 2025; potential to escalate into federal investigation.	
Spokespersons	CEO (for both external and internal audiences)	
Priority Audiences	External: • Grantees • Community members • Donors and financial partners • Sector peers/leaders • Media (potentially)	Internal: • Board members • Employees
Sample Tactics	External: 1:1s with grantees and key donors; consultations with sector peers/leaders; holding statement for media; response on social channels	Internal: Messages to board, employees; internal town hall

Sample Health Philanthropy Scenario

CRISIS SCENARIO: *Nonprofit Status Threatened*	A full-scale attack on the nonprofit status of one or more philanthropic organizations, including health philanthropies, and the start of IRS investigations with the aim of revoking tax status.	
Communications Imperative	Reinforce the necessity of health philanthropy and the critical role health grantmakers play in the communities in which they operate and the overall health ecosystem. Support/demonstrate solidarity with peers in the sector and beneficiaries as part of a coordinated effort.	
Experts	• Grantmakers In Health • GIH CEO Working Group	• Council on Foundations • Foundation CEO

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CRISIS SCENARIO: *Nonprofit Status Threatened*	A full-scale attack on the nonprofit status of one or more philanthropic organizations, including health philanthropies, and the start of IRS investigations with the aim of revoking tax status.	
Key Facts / Questions to Answer	- What is the timeline for response? - What levers can be pulled to impact the outcome? - Has this changed strategic priorities? To the field? To my organization? - How does this affect our own organization and our grantees? - What would the effect be on our community? - How can I be most helpful in my state/community, and what is the most effective way to join with others? - How can I give cover to other organizations to join in this effort?	
Key Voices to Watch	- Local and/or regional media - Trade outlets: Philanthropy, Finance, Health care	- Government: Policymakers, Regulators - Social media
Spokespersons	External: Local and national sector leadership	Internal: CEO / Executive Director
Priority Audiences	External: - Policymakers - Grantees - Community members - Donors and financial partners	Internal: - Board members - Employees
Sample Tactics	External: Holding statement for media, sign-on letter, social channels	Internal: Messages to board, employees, Funding Partners, grantees; Virtual industry town hall

Appendix: Practical Crisis Response Tools

Key Audiences and Communication Channels

In advance of a crisis, you should have a sense of your key audiences and through which channels you can reach them most effectively. This will ensure you don't miss any stakeholders in the heat of a crisis.

Audience	Example Communication Channels
Media	Email (statements), phone, in-person interviews
Employees	Email, town hall (telephone or in-person), individual meetings
Board	Email, phone/text, virtual/in-person meetings
Donors	Website, social media, email, newsletters, media, phone/text, virtual events, in-person meetings
Grantees	Website, social media, email, newsletters, media, phone/text, virtual events, in-person meetings
Government Officials, Policymakers, Regulators	Phone, email, in-person meetings
Community / General Public	Media, social media, website

Spokesperson Matrix

It is also helpful to map out who will speak to each of your core audiences and in what circumstances. This is particularly important when coordinating responses across an organization and when coordinating across the sector. It may be helpful to identify and recruit potential spokespersons outside your organization who have existing thought leadership platforms and who are respected within and beyond the community or the sector. Make sure these individuals understand their roles in a crisis and are trained on the latest messaging.

Options for Responding

Lower Risk Tactics

- Monitor earned and social media carefully once an issue arises and/or a story publishes to assess whether it is gaining traction or dying down with key audiences. Assume a "rapid response" posture and be prepared to quickly contact media to request a correction for inaccurate information.

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- Not engaging with the media (though usually without saying 'no comment' explicitly) is an entirely appropriate approach for most cases.

- Remain in reactive mode with a holding statement ready if and/or when external inquiries are received.

- In lower risk situations, it is important to be mindful to craft a "durable" initial statement that can hold up as things develop and will not need to be adjusted frequently. It is usually unhelpful to the external narrative to put out several statements with changing facts and messages.

Moderate Risk Tactics

- Proactively contact media to share an updated statement or to request a correction for inaccurate information.

  o Directly contact publication(s) by either writing a letter to the editor (LTE) or issuing a complaint to the reporter's editor if they handle information irresponsibly and/or do not respond when (per above) contacted to correct information.

- Proactively contact key stakeholders *(e.g., employees, board members, grantees, influential third-party groups)* to provide them with information personally and help prevent them from further commenting on or advancing the story.

- Send an internal note to employees that can be purposely leaked and/or given to a reporter—the internal communication becomes the vehicle for communicating externally without the need to elevate the issue more by creating separate external vehicles *(i.e., statements, releases, blogs or interviews)*.

  o Alternatively, hold an employee town hall if the incident is serious enough.

Higher Risk Tactics

- Post comments widely, either on social media, in a blog, or via press release.

- Publish a "Did You Know?" fact sheet or backgrounder on the issue as transparently as possible, either ahead of or separate from the reporter asking—this could be accompanied by a blog post refuting the piece point-by-point.

- Consider holding an emergency zoom meeting with grantees to dispel falsehoods.

- Offer media interviews with a subject matter expert. Put organization leadership on broadcast television or print media.

- Consider launching an internal investigation or independent review to look into the incident and pledge to abide by its recommendations.

- Launch a sustained communications campaign to educate key audiences and stakeholders about the organization's values, actions (existing and future), and policies within the area in question.

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Sample Crisis Communications Rollout Plan

Date / Time	Task	Lead	Status
[DAY, MONTH, DATE] [TIME AM/PM]	Develop external response strategy	Communications lead / Crisis Working Group	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Develop internal response strategy	Comms lead / Crisis WG	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Approve external response strategy	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Approve internal response strategy	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Develop list of communications materials needed *Note: the following steps will be based off this list and off the approved internal / external response strategy*	Comms lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Draft key messages / talking points based on info from the Crisis WG	Comms lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Approve key messages/talking points – *use to build out communications materials*	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Draft holding statement *(backgrounder if necessary)*	Comms lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Approve holding statement *(backgrounder if necessary)*	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Draft FAQs and tough questions	Comms lead	[In progress / Complete]

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Date / Time	Task	Lead	Status
[DAY, MONTH, DATE] [TIME AM/PM]	Approve FAQs and tough questions	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Draft internal / board communications – *determine best channels*	Comms lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Approve internal / board communications	CEO / Crisis WG lead	[In progress / Complete]
[DAY, MONTH, DATE] [TIME AM/PM]	Distribute internal / board communications – *on approved channels*	Comms lead	[In progress / Complete]
As received	Evaluate inbound inquiries for response	Comms lead	[In progress / Complete]
As needed	Respond to inbound inquiries w/ holding statement *(backgrounder if necessary)*	Spokesperson / Comms lead	[In progress / Complete]
If necessary:			
As new information is available	UPDATE holding statement, comms materials	Comms lead	[In progress / Complete]
As needed	Approve UPDATED holding statement, comms materials	CEO / Crisis WG lead	[In progress / Complete]

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Key Communications DO'S & DON'TS

DO'S	DON'TS
• **DO** assess the situation efficiently and swiftly to determine the appropriate level of response.	• **DON'T** speculate on anything or provide incomplete information. Stick to the confirmed facts—don't guess on damages, blame, cause, or other uncertain issues.
• **DO** assume "worst-case" outcomes for planning purposes.	• **DON'T** let erroneous information or ill-informed opinions go uncorrected. Present the facts.
• **DO** ensure all responses are candid, accurate, and timely. Ultimately, be honest and tell the truth.	• **DON'T** be silent or make "no comment" statements; they are often interpreted as admissions of guilt and lack of preparation.
• **DO** keep employees informed to the extent allowed/appropriate. • However, **DO** assume whatever you say to one audience may be shared with all audiences.	• **DON'T** release sensitive or proprietary information.
• **DO** contact key external stakeholders proactively; keep them informed throughout the term of the event.	• **DON'T** be the one to create unwarranted concern or attention if you can avoid it.
• **DO** operate as one coordinated team within the Crisis Working Group.	• **DON'T** make "off-the-record" statements—there is no such thing in a crisis.

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Guidelines for Media Engagement

Effective management of the media can help mitigate both the duration of a crisis and the extent of reputational damage. To achieve this, follow these guidelines for media relations:

- **Resist the pressure to give a response on the spot if a reporter calls unexpectedly.** Instead, calmly say you will gather the information for an answer and call back. Often, these requests are time sensitive, so you should find out if the reporter is on deadline and when they need a response for their story.

- **Consider the risks of not responding.** Silence during a crisis is not always the answer. By avoiding media, you can miss an opportunity to share the facts and your story first, you can open the door to unwanted speculation, and other organizations (or your detractors) may have the opportunity to define your narrative for you. You can also hurt your long-term relationships with reporters, especially if you say you'll get back to them and then don't—no ghosting!

- **Avoid the words "no comment," and only comment on facts.** The phrase "no comment" is not an acceptable answer; studies have shown that those words create perceptions of untrustworthiness or guilt. If necessary, choose another way to refrain from commenting. Also, never comment on rumors or speculation.

- **Alert colleagues.** Make sure anyone who might be contacted about the story knows to expect such inquiries.

- **Respond quickly to try to control the message.** In the eyes of the public, responsible and trusted organizations respond quickly. In general, you want to ensure any stories being written have the benefit of your input. Sometimes you may not want to respond to an inquiry or take part in a story; that should be a deliberate decision after considering your options.

- **Use a consistent media contact.** Often the media will call several sources to try to get as much information as possible—including organizational leadership, staff, and board members. To maintain message consistency, it is important to limit the reporter's contact to one person by directing all inquiries to that person.

- **Do not provide information that has not been fully confirmed.** Coordinate closely with the Crisis Working Group to ensure you are aligned on what information can be shared for each response. Do not speculate—it's better to get back to a reporter once the information is correct than to say something inaccurate.

Throughout a crisis moment, keep a media log of reporters who have inquired about the situation or that you have contacted directly. Record the reporter's name, media outlet, time and date of contact, telephone number, email address, specific questions, nature of the article or broadcast, deadline, and expected date/time of publication. This can help refine and target the next set of communications.

Guidelines for Social Media Engagement

During a crisis, social media should be used primarily for monitoring, evaluation of sentiment, and keeping you informed of emerging issues.

However, under certain circumstances, and based on the Crisis Working Group's strategic guidance, the social media team may engage with stakeholders online involved in the crisis or who are in need a response and will link to relevant information or news.

Social Media Considerations

General guidelines for engaging with social media include:

- Social media engagement should be on a **reactive basis only**.

- **Do not proactively post information unless there are extenuating circumstances—** such as if the crisis is widespread or a critical update must be delivered, and social media is the fastest and most convenient way to alert stakeholders or manage their expectations.

- **"Trolls" should not be engaged in any manner.** Certain social media users may use the crisis to gain more followers or increase their visibility by making or insinuating inflammatory accusations. Engaging with them will only encourage more of the same behavior and help amplify their content.

- **Special consideration** should be given to:

  o Current and/or former employees who post about the crisis on social media platforms, as the organization's response may drive additional scrutiny from external audiences or criticism from internal audiences.

    ▪ As part of this effort, organizations should draft, regularly review and update, and recirculate an employee social media policy.

  o Government influencers, including voices who have gained traction or who can turn an accusation into a more formal investigation.

Social Media Response Criteria

When evaluating whether to respond on social media, each post should be assessed based on the content, reach, influence and the popularity of the site or poster *(e.g., X/Twitter thread, YouTube video)*. Based on these criteria, you should consider whether to respond to a post if it:

- Contains erroneous information;

- Confuses the matter or increases concerns; and

- Spreads false, incomplete, or misleading rumors or speculation that could be harmful to the organization's reputation or business.