

Catholic Charities

Communications Management Guide

PREPARED BY CCUSA MEMBER AGENCIES. **SEPTEMBER, 23, 2019**



Working to Reduce Poverty in America

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Foreword

Crisis happens. In fact, it's almost inevitable that a crisis will eventually involve your organization. With the guidance of our faith and advice from our peers, we can prepare to anticipate, mitigate and move through times of crisis with accountability and compassion.

Leadership from Catholic Charities member agencies and CCUSA assembled this crisis communications guide, based on the shared experience of Catholic Charities executives, to serve as a resource for our colleagues. This resource will help you develop an effective crisis plan and assemble a team that can respond to any situation, including:

- Crisis strategies, steps and action plan
- Managing the media: owning the narrative and building relations
- Social listening and two-way social media
- Technology, teamwork and rapid response
- Internal communications: guidance for staff and best practices to sooth stakeholders

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Overview

Every crisis is different. No two crises are the same; no one plan works for all. A crisis can be based on reality: an incident occurs in full view of the public. After all, people make mistakes, accidents happen. And, a crisis can be based simply on perception: for example, on false or misleading information.

Crises will occur. Crises can happen and they can move fast. Social media can spread information – accurate or not – before you have a chance to take action. Your understanding of the “facts” probably will change. There will be unexpected twists and turns. You will survive, especially if you manage the first few hours well.

What can go wrong? Plenty. Most Catholic Charities agencies deal with sensitive matters that can carry a wide range of requirements for honoring human dignity and protecting confidentiality. (See the section in this guide on issues management for examples of types of crises.)

Why prepare?

- To ensure that your agency can respond to a crisis and continue operations.
- To maintain and protect the image and brand reputation of your agency.
- To safeguard contributions from donors and the integrity of major grants.
- To keep staff and other stakeholders informed.

Preparation Basics

- Before a crisis strikes, establish your crisis team, ideally including supervisors from major departments. Identify the chain of command for reporting a crisis.
- Identify potential scenarios
- Create a phone tree with work, home and cell phone numbers of your local and area team members. Share the phone tree information with anyone who would be in a position to communicate across the agency.

Identify Members of Crisis Management Team. (CMT). CMT members will vary from agency to agency, but should/could include:

- President/CEO/Executive Director
- Members of senior/executive team: e.g. - programs, finances, fundraising
- Lead communications staff
- As necessary: human resources, legal counsel, information technology, (arch)diocesan

Above all, stay calm.

The more serious the crisis, the more we are likely to think as individuals rather than as a team. Avoid the impulse to act in a vacuum. Assemble your team. Gather input before or during the development of a plan for action.

Once a crisis is identified:

- The incident should be reported to a designated member of the Crisis Management Team (CMT)
- The CMT member gathers the facts, e.g.:
 - What do we know at this time?
 - What don't we know at this time?
 - Were clients involved?
 - Who's in charge at the site?
 - Have police or EMTs been contacted?
- If not already informed, notify executive leadership to determine next steps.

CMT responsibilities:

Once the CMT is assembled they will need to:

- Determine if someone is needed at the site of the crisis.
- Reach agreement on response plans and contingencies.
- Ensure team members understand their responsibilities.
- Set crisis communications strategy into action. (See the section of this guide on Crisis Communications Framework)
- Monitor activities and reconvene the entire team as appropriate.
- Following the resolution of the crisis the team should regroup to discuss lessons-learned, takeaways, etc.

Executive/senior leadership responsibilities:

- Provide direction to crisis responders
- May serve as spokesperson
- Notifies stakeholders as appropriate, including:
 - (Arch)Diocesan leaders
 - Board of directors
 - Partner agencies
 - Government officials
 - Large donors (in coordination with Development lead)
 - Other members of senior leadership
 - Staff/Consultants/Volunteers

Examples of additional departments and related responsibilities that may be involved in crisis management and response:**Programs/Operations Staff:**

- Identify disruption to offices
- Inform program/operations staff as needed
- Designate point person and begin steps to resume return to normal activities/operations

Human Resources Team:

- Coordinate grief/trauma support for staff/clients/others as necessary
- Inform all staff as needed
- Coordinate contact with families of staff/clients/others as necessary
- Ensure crisis strategy and action plan is in line with HR policies

Insurance/Risk Department

- Assess risk and liability involved in the crisis, provide counsel
- Ensure claims are addressed ASAP in a proper manner

Legal Counsel

- Determine legal implications of crisis strategy and action plan
- Provide counsel as needed to Crisis Management Team

Communications/PR Lead

- Implement crisis communications activities including:
 - Create internal and external messages
 - Distribute messages/statements to media, website, social media (if appropriate)
 - May serve as spokesperson

SUMMARY RULES OF CRISIS MANAGEMENT

- Identify and contain the issue.
 - Call 911 if there is hazard to life or security.
 - Protect clients and staff.
 - Secure the area.
 - Contain phone usage (no unauthorized photos or videos).
- Notify the proper chain of command.
- Assemble the Crisis Management Team
- Implement the prepared strategy.
- Develop talking points/messages with key information
- Monitor the situation.

Crisis Response Plan Framework

When a crisis occurs, members of the Catholic Charities USA network must be prepared to communicate our position and/or response in a clear, compassionate voice consistent with Catholic Social Teachings.

The following plan outlines a course of action that should be adjusted to fit the severity and duration of a crisis situation. In general, a crisis is defined as a situation that may affect the reputation of an agency; or an emergency that affects the well-being of an agency's employees, volunteers or clients.

FIRST, PREPARE

Anticipate

1. Before a crisis occurs, identify your agency's vulnerabilities. Which areas of operation have the most potential for reputational or operational emergencies? What are the worst-case scenarios? Where is risk most profound?
2. Know who will be on your Crisis Management Team (CMT) and how to contact them at any time. In general, members would include:
 - Your CEO/President/Executive Director
 - Pertinent executive/senior staff
 - Top level communicator (Communications Lead)
 - Top level fundraiser (if not already on senior team)
 - Pertinent program staff
 - Diocesan representation as appropriate
 - Board representation as appropriate
3. Run crisis simulations for various scenarios. Develop a series of "holding statements" or talking points that could be used in responding to various situations.
4. Identify an accessible location for off-site crisis management activities if needed and ensure it's equipped for use. Ensure that each member of your Crisis Communications Team is prepared to interact and operate from off-site locations if they are unable to get to your central crisis management location.
5. Have contact information for CMT stored on cell phones and as grab-and-go hard copy (handy in the event of power outages) in one's office and at home: for staff, key volunteers, board members and any other stakeholders with whom you have the most interaction (e.g., property managers, partner organizations); and media outlets (usually maintained by communications staff)
6. Create a phone tree for contacting all staff in the event that email or a texting service is unavailable.

Assess and formulate

1. In general, the CEO determines whether there is a crisis. The CEO and appropriate advisors determine the severity or potential severity of the situation. This will guide the level of your response.

2. Assemble the needed members of your CMT to gather information and determine whether the crisis merits a proactive or reactive response. In some cases, it could be advisable to wait until questions come to you (for example, from a media representative) before responding externally to a situation.

Some questions to ask:

- How big is this crisis?
- Is legal counsel or are emergency responders required?
- What do we know?
- What don't we know?
- What are we doing in response to the crisis?
- What (if any) information can be shared at this moment, and with whom?
- What kind of damage could the situation cause to the agency's reputation/image?
- What kind of practical damage could result (e.g., financial, physical)?
- Is this something we want to communicate to the media, including news outlets, social media and website postings?
- What CAN and CAN'T be said? Are there confidentiality issues? What are the agency's privacy policies?
- Is there potential public interest? Does the issue have traction (will it become anything more than a short-term media phenomenon)?

3. Set a game plan for moving forward and assign tasks for crisis communications activities, based on the availability of the Communications Lead, members of the CMT or other appointed staff.

4. Prepare a set of facts about the crisis, including at the very least:

- What happened
- What we're doing about it now
- What we plan to do moving forward
- Based on the above, prepare a brief written statement that can be sent out in response to potential media inquiries. This will show immediate response to the situation as well as provide the same consistent message across all outlets and channels.

NEXT, COMMUNICATE

1. Determine who will be the lead spokesperson/point of contact. Prepare talking points or response statements to distribute, targeted if possible to various stakeholder groups.

- High level summary of the incident/crisis: who, what, when, where.
- Express concern or sympathy, if appropriate.
- Explain what we're doing/how we're addressing the situation and why.
- Include positive messages about the agency – related facts (history/statistics), positioning statements.
- Don't assign or accept blame.
- Speak only for the agency. Don't speculate about the response of other entities.

2. If warranted, inform and equip front desk and other pertinent staff who receive incoming calls about the crisis and how to handle calls.

3. Determine if and how staff are to be notified, including staff who are both on-site and off-site. Methods for communicating with staff could include in-person meetings, staff gatherings, email, departmental meetings and phone calls.

4. Determine who else needs to know among your agency stakeholders and how they should be contacted, using a prepared statement or talking points. Possible stakeholders include:

- Diocesan or archdiocesan officials
- Board of directors
- Parishes
- Program and other community partners
- Donors
- Volunteer leadership
- City/county/state elected officials
- Relevant licensing authorities

5. If the CMT determines that there should be communication through the media, including news outlets, social media and website postings, the Communications Lead should:

- Identify and prepare a media spokesperson who will speak for the agency, if not the Communications Lead. This person should be clearly identified and the role swiftly communicated in a way that mitigates comments from unauthorized spokespersons.
- Prepare media releases or statement for distribution to media outlets, either proactively or on request.
- Prepare postings to social media sites and website and post as warranted.
- Draft letters (email or print) to key external audiences if needed.
- Prepare FAQ document for internal use.
- Determine whether to allow photography of the scene.
- Schedule a media news conference if necessary.

NOW, MONITOR

Almost any situation, regardless of its severity, can affect perceptions long after the situation has passed. An extended response may be necessary. The Communications Lead and/or the CMT should continue to monitor media, social media, comments from stakeholders and any other forum in which opinions can be expressed related to the situation. Google News Alerts and/or other media/social monitoring tools such as Talkwalker Alerts can be helpful and timely; alerts for branded/relevant keywords should be set up. The Communications Lead, in consultation with the president/CEO, should determine if further responses are necessary, and how and when to respond.

LASTLY, EVALUATE

The Communications Lead, along with the CMT Team as needed, should seek feedback from key stakeholders in a reasonable time frame following a crisis in order to gain insight that may shape future crisis communications activity. Some questions to ask:

- Did we tell you what you needed to know, when you needed to know it?
- Did we say it the right way?
- Did we use effective tools for saying it?
- Was there anything you wish we had done differently or could have handled better?

Issues Management – Network Examples

This section includes examples of holding statements as well as case studies based on actual responses prepared by Catholic Charities agencies.

Issues management is a process of anticipating trends, responding to challenging events and engaging critical stakeholders. The goal for issues management is to uphold the good reputation of your agency in the event that something should happen that could throw your integrity into doubt.

The simplest way to sum up issues management is “worst case scenario thinking.” What’s the worst thing that could happen? What would we do and say if it did? To whom would we say it and when?

In the event of a crisis, standard responses could include one or more of the following (as appropriate for the situation):

- Summarize the incident/crisis: who, what, when, where.
- Express concern or sympathy
- Explain what we’re doing/how we’re addressing the situation and why
- Include positive messages about your agency – related facts (history/statistics), positioning statements
- Don’t assign or accept blame
- Speak only for your agency – don’t speculate about the response of other entities

SAMPLE HOLDING STATEMENTS

A holding statement provides language that can be used in the event of a crisis until your agency has time to conduct an investigation and/or determine which additional facts can be released. It should indicate that your agency is in the process of gathering facts with intention to say more at a later time.

Death

Our hearts go out to _____ during this time of loss. I know everyone at Catholic Charities joins me in praying for the family as we offer our deepest sympathies. We are actively looking into and confirming (*describe possible issue/e.g., fatality*).

The security and safety of (*staff/volunteers/neighbors*) is always our first priority. As more information is available, we will share it.

Lawsuit

Catholic Charities is aware of the legal filing/lawsuit situation and working to gather the facts as quickly as possible. We are cooperating fully with authorities. We are limited in what information we can share right now, but we intend to provide additional information as soon as we can.

Misdeeds (e.g., financial misappropriation or publicly identified wrongdoing by employees or volunteers)

Catholic Charities holds our employees (volunteers) to the highest standards and takes action when we learn that someone may not have behaved according to our values. We are investigating this situation and gathering facts as quickly as possible. We are cooperating fully with authorities. We are limited in what information we can share right now, but we intend to provide additional information as soon as we can.

ACTUAL AGENCY CRISIS SCENARIOS

Unfavorable Social Media-related Situations (from Catholic Charities New Hampshire)

Situation

A nursing center employee took an unauthorized video of her covering the mouth of one of our elderly residents; shared video on social media

Press Statement

Catholic Charities New Hampshire is committed to providing the highest level of care, respect and safety for our residents. We do not accept anything short of that.

We were recently made aware of troubling allegations regarding one of our employees videotaping a resident at one of our skilled nursing facilities. This is in clear violation of our corporate social media policy, but also the rights, dignity and privacy of that resident.

We immediately contacted law enforcement and are launching an internal investigation. The employee was also placed on suspension and removed from any resident contact, pending the outcome of the investigation.

We take these allegations very seriously and will ensure this is resolved in a swift and timely fashion.

We regularly conduct mandatory resident rights and safety training for all employees as we work to maintain the dignity and compassion of our residents. All employees will also be required to review and attest to the latest organizational social media policy.

Cyber Security (from Catholic Charities New Hampshire)

Situation

A potential data breach; Catholic Charities New Hampshire receives word that 5,000 donor records (name, Social Security number and email address) may have been compromised when an employee's computer system, which houses that data, was hacked.

Press Statement

Catholic Charities New Hampshire was recently made aware of the potential compromise of personal data related to approximately 5,000 of our donors, stemming from a malicious external cybersecurity attack.

Upon becoming aware of this potential breach, we immediately notified the NH Attorney General's Office as well as the local authorities. We remain fully cooperative with all current investigations.

We also contacted all of the donors to make them aware of the situation and told them they would receive further updates as we receive more information on the issue, both with our internal investigation as well as findings from the NH Attorney General's office.

While no organization or entity is immune from a breach of this nature, Catholic Charities New Hampshire remains vigilant and proactive to prevent such occurrences and we are committed to preserving the integrity and security of all donor, staff and resident-sensitive information. As part of that, all CCNH employees receive mandatory cybersecurity training and strictly adhere to all data privacy policies throughout the year. We will review these policies to assess potential shortfalls.

Abuse (from Catholic Charities Madison)

Communications Team: CEO, Director of Development & Communications, Director of Programs, Director of Human Resources. Optional depending on the circumstances: board chair and Bishop.

Message: At approximately 9 a.m. this morning, a family member of one of our clients in the developmental disabilities program reported to the Department of Health Services that her mother was abused by a Catholic Charities of Madison employee. We are aware of the situation and are working to gather the facts as quickly as possible. We immediately contacted the authorities and are launching an internal investigation. The employee has been placed on suspension and removed from any contact with our client pending the outcome of the investigation.

We take these allegations very seriously and will ensure that this is resolved in a swift and timely fashion. The security and safety of our clients are always our primary priorities. We are limited in what information we can share right now, but intend to provide updates as more information becomes available.

Active Shooter (from Catholic Charities Madison)

Communications Team: CEO, Director of Development & Communications, Director of Programs, Director of Human Resources. Optional, depending on the circumstances: board chair and Bishop.

Message: At approximately 10 a.m. this morning, a client at The Beacon Homeless Center (a facility managed by Catholic Charities of Madison) fired a handgun in the courtyard of the facility. Catholic Charities of Madison immediately contacted the Madison Police Department and are awaiting further instructions from the authorities. (Insert more details here as they become available.) I know that everyone at Catholic Charities joins me in praying for the safety of all concerned as the situation unfolds.

The Beacon and Catholic Charities of Madison are committed to providing the highest level of care in a secure and safe facility for men, women and children experiencing homelessness. We are limited in what information we can share right now, but intend to provide updates as more information becomes available.

Fire (from Catholic Charities New Hampshire)

Situation

There was a small fire at one of our nursing facilities and one resident was injured (due to a fall when the fire alarm went off). Local media covered the incident. The fire was put out quickly and the injury was minor. The media dropped the subject quickly so we didn't have to use the press statement that follows.

Press Statement

At approximately 10 p.m. last night, a staff member reported a fire in the first-floor kitchen area. Staff was fully prepared through our emergency preparedness plan and regular fire safety training program. We immediately notified the Manchester Fire Department and staff worked to extinguish the small blaze until the MFD arrived and the fire was eventually put out.

Residents were not relocated at any point. One resident experienced minor injuries while in their room and is recovering.

The minimal damage was confined to a small area of the kitchen, located on a separate floor from any resident rooms. We are currently working with a contractor and the Manchester Health Department to restore services in that area as soon as possible.

In the meantime, dining services remain fully operational. Resident meals are being prepared in our secondary kitchen areas, housed on each floor in the building. Breakfast was served this morning as planned.

Mt. Carmel Rehabilitation & Nursing Center and Catholic Charities New Hampshire are committed to providing the highest level of care and safety for our residents. We will review the situation internally and identify any steps required to ensure it does not occur again. Mt. Carmel will also continue fire safety training for all staff members.

We thank the Manchester Fire Department for their rapid response and remain fully cooperative in their investigation.

Staff Guidelines for Media and Messaging during a crisis

Guidelines of this nature are intended to notify all staff in an agency about what to do in the event that a crisis could attract external attention – e.g., from stakeholders or the news media. Tailor this policy to fit your agency's staffing structure, policies and identity messaging.

The (agency's communications lead title) ensures that the agency's mission, response to media inquiries and presentation of events are represented with one, unified voice in a manner consistent with Catholic Social Teaching. The (agency's communications lead title) will ensure a clear, consistent, accurate, authoritative and timely message is communicated to the public on behalf of the agency. We try to cooperate with the media whenever possible and appropriate.

The (agency's communications lead title) as well as the appropriate agency and civil authorities must be notified of a crisis or any potential crisis immediately.

A crisis is defined as any emergency or controversy that could significantly impact the public perception or reputation of the agency.

- Emergencies may include, but are not limited to: fires, accidents, explosions, weather-related incidents and natural disasters.
- Controversies include events such as crimes or threats against agency personnel; inappropriate conduct by staff or volunteers; litigation, fiscal irregularities and personnel issues that receive public notice.

1. If unsure whether the topic may be controversial or result in a news report involving the agency, please contact the (agency's communications lead title) immediately to discuss the issue. (Agency's communications lead title) will consult with appropriate agency leadership to make the final decision on how the media inquiry will be addressed.

2. Any media inquiries about the agency, staff or volunteers should be directed to the (agency's communications lead title). In response to any media contact or inquiry, agency personnel are to advise the reporter: "The (agency's) policy is to refer all media inquiries to the (agency's communications lead title). You may contact the office at (phone number and/or email)."

3. If a reporter, photographer or video crew arrives unexpectedly at the agency in response to a crisis, contact the (agency's communications lead title) immediately. You or your authorized representative may be directed to speak or not to speak with the media after the (agency's communications lead title) determines if any response is appropriate.

- a. Although the media cannot be prevented from photographing or filming the exterior of an agency building, the (agency's communications lead title) will contact their newsroom and/or editors for clarification of coverage.
- b. The media cannot enter agency facilities to record, photograph or attempt to interview anyone without explicit permission.
- c. The media cannot block the entrance to agency facilities, or prevent people from entering buildings or conducting business as usual.
- d. The media can be instructed not to block or interfere in any access area, such as parking lots, driveways, doors, walkways, etc., if staff complains about the inconvenience caused by their presence in those areas.