

## WRMC Action Steps 2012

The true value of attending the WRMC is in the resulting action you take upon returning to your organization. The following list is intended to help you know where to start.

Action steps are measurable tasks or ideas you should be able to do or implement in your program within a reasonably short time frame. They are not meant as large sweeping changes, rather as small steps to move you forward in your risk management strategy.

Each presenter has contributed three action steps from their 2012 WRMC workshop. In some cases the action steps parallel the main take home points of the workshop; in other cases the action steps are examples of a multitude of possible follow-up action.

## STAFF TRAINING & DECISION MAKING

Thursday, October 25

### Real People Making Real Decisions

Tod Schimelpfenig and Brendan Madden

1. Conduct an internal training focusing on mindfulness in field staff decision-making and incorporate new vocabulary into staff supervision, mentoring and coaching.
2. Choose as a debriefing topic a decision made by your program staff (which could be a field incident or a decision which avoided an incident) and conduct an effective review of that decision.
3. Implement one new staff-training component centered around awareness of decision-making.

### Analyze, Manage, and Inform: A Useful Decision Making Tool from the Office to the Field

Dave Yacubian

1. Identify 1 - 3 areas of your program (activities, course types, or location) that you have concerns about and run them through the AMI model.
2. Include the AMI model as a step in your new program planning process.
3. Introduce the AMI model at a field staff training as an additional decision-making tool.

### Accelerated Training: Using Systems to Get Staff Quickly Up to Speed

Jeff Jackson

1. Measure training system complexity needs (System Complexity Index tool provided)
2. Identify acceleration areas of training system; align with organizational complexity and risk tolerance
3. Focus on the hired hands - target and differentiate training to those who need it most.

### Analysis of an Accident on a Staff Outing

Phil Powers

1. Determine the leader in peer teams
2. Recognize the dynamics between more and less experienced climbers in peer teams.
3. Re-describe the pre-climb checklist in the sport and gym-climbing environments.

**Friday, October 26**

**The Phone Interview: Evaluating Candidates From A Distance**

Gates Richards

1. Write three qualities of an employee you consider a model in his/her position.
2. Pick one interview from your workplace to go home and critique.
3. Replace or rewrite three questions from that interview.

**Assessing Incident Data for Targeted Training: The Importance of the Near Miss**

Josh Cole and Steve Smith

1. To accurately assess their programs, program administrators and senior staff should accurately understand the incident data that they collect, particularly the limitations of that data.
2. Programs should use their training resources to focus on teaching instructor judgment and assessment skills with the goal of preventing significant incidents.
3. Program administrators can assist the decision-making skills of their staff by providing consistent operational language and tools for assessment and decision-making.

**Three Plug and Play Staff Training Activities**

Shana Tarter

1. Introduce at least one new staff training activity into your program this season.
2. Use the value clarification exercise with your administrators and then your instructors to identify areas of difference.
3. Use "reverse planning" to improve training and meeting design throughout your organization.

**Quantifying the Risk in Adventure**

Ross Cloutier

1. Use the information included in the WRMC Resources Center to quantify the risk of each of your programs
2. Ask one of your land managers if they are currently using these tools
3. Create a staff training around one of the models presented in this workshop.

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## **PROGRAM ADMINISTRATION**

**Thursday, October 25**

### **Advocating for Risk in a Risk Averse World**

Christopher Barnes

1. Develop your message points to advocate for risk
2. Practice advocating for risk, via scenarios applicable to your program
3. Reference list of related articles and examples

### **Health, Safety and Security Abroad: A Strategic Approach**

Bill Frederick

1. Gauge and critique the appropriate level of risk management for one international program.
2. Acquire one resource recommended in the workshop and apply it to your program.

### **Learning from Our Mistakes: Assessing Risk through Data Analysis**

Kurt Simer and Mark Bixby

1. Determine the definition of an "incident" for your organization. What needs to be reported? Update your staff training, reporting procedures, and paperwork accordingly.
2. Determine your organizational goals for the collection of these reports. Develop a plan to analyze this data.
3. Adjust your organizational communication to reflect these goals. Have a plan for putting your new knowledge into action.

### **Successful Risk Management Committees**

Aram Attarian

1. Write a mission statement for your risk management committee that clearly outlines its responsibilities.
2. With your risk management committee members conduct a SWOT analysis. Once the analysis is complete, focus efforts on improving the committee's performance and effectiveness.
3. If your program does not have a risk management committee, write a mission statement and create a list of qualifications for membership, describe member roles, and expectations. Use this as an initial exercise in creating your committee.

**Friday, October 26**

### **Two Silos and a Crosswalk**

Rebb Gregg and Catherine Hansen-Stamp

1. Consider the application to your program of this "deep grass" and "quick" approach. Does it fit? What would you add to either silo?
2. Test some of the elements that you may not have considered previously as a risk management issue—administrative support, or the recording of near misses for example.
3. Grade your organization on how it performs in the areas described - in both silos.

## **Medical Oversight for Wilderness Activities**

Seth Hawkins

1. Improve emergency medical care delivered by instructors/leaders by having a medical advisor review and revise your current evacuation protocols.
2. Reduce incidence of events requiring medical care by having a medical advisor involved in your medical screening process.
3. Improve risk management resources available to program instructors and managers by obtaining a medical advisor, or by including your current medical advisor into more on-site reviews and activity participation.

## **Managing Risk with Volunteer Leaders**

Alex Kosseff and Melanie MacInnis

1. Discuss potential changes in risk management practices with field leaders to obtain valuable input, increase buy-in, and promote universal implementation.
2. Brainstorm creative leader training approaches and implement at least 2 new ideas that could improve on the status quo.
3. Learn the training and safety approaches at a peer organization and implement 1-2 of their best ideas in your program.

## **Unique Risk Management Issues in Serving Veterans and Military Families in the Outdoors**

Stacy Bare, Kevin Heiner and Jay Satz

1. Create a staff training that gives application managers the tools necessary to effectively screen veterans and service members for program participation.
2. Expand medical questionnaire to fully capture issues relating to post traumatic stress (PTS) and traumatic brain injury regardless of applicants military affiliation.
3. Create a 30 minute staff training highlighting and providing resources for these three things: a. Basic literacy of military rank and force structure; b. Conversations and questions to encourage and avoid; c. Increased understanding of the value veterans and service members bring to courses.

## FIELD PRACTICES

Thursday, October 25

### **Do You Know What Your Staff Doesn't Know? Cultural Competence and Risk Management**

Robin Chiles and Jenni Conrad

1. Assess your organization for its current level of cultural competency using the model given, including your staff/volunteers who work in the field.
2. Define cultural competency with your staff/volunteers during their training, including specific areas of organizational strength and areas to focus for growth.
3. Find 3 areas or examples of relevant connection for your organization/staff between cultural competency and risk management to share and discuss as part of your staff/volunteer training.

### **The First 72 Hours: Creating a Culture of Risk Awareness**

Susie Caldwell Rinehart and Chris Yager

1. Identify the key risks associated with a specific program and formulate strategies for proactively mitigating those risks during the first 72 hours of the program start. If applicable, consider risks unique to international program orientations.
2. In the workshop (and on the WRMC Resources page) we provide a sample risk management rubric for planning the first 72 hours of a program. Based on this template, outline a program-specific orientation guideline for the first 72 hours of your program.
3. Take one action to create a culture of risk awareness that proactively lays the foundation for risk conscious staff, students, and groups.

### **Wilderness Medicine: Current Topics**

Tod Schimelpfenig

1. Review whether your staff medical certification requirements are matched to your needs and the context of your programs.
2. Review your annual staff training to determine if you need to provide ongoing medical training.
3. Review your medical protocols to determine if they match the current recommendations for WFA or the WFR Scope of Practice.

### **Systems Analysis of Led Outdoor Activity Accidents: Development of a New Accident and Injury Data System**

Paul Salmon

1. Review your organizations accident and near miss reporting and analysis systems and question whether appropriate data is currently being collected and analysed in-line with contemporary accident causation models.
2. Re-analyse a sub-set of incidents using the systems analysis framework presented. Use the outputs to communicate the systems analysis philosophy throughout your organization.
3. Consider, with others in your organization, the benefits associated with contributing data to an International accident and near miss database such as UPLOADS.

Friday, October 26

### **The Risk Management of Teaching and Practicing Advanced Climbing Skills with Students**

Anna Haegel

1. Return home and analyze the discussed components to see if adopting advanced skills for students is an appropriate step for your program. Develop clear steps in 3 of the areas to accomplish in the next year of your program.
2. Work with other employees and administration to develop a written progression with measurable benchmarks for students' advancement in each skill.
3. Develop clear, written expectations for the qualifications and experience level for a lead instructor in your climbing program.

### **Accidents in Outdoor Pursuits: Assessment and Prevention Approaches**

Jed Williamson and Aram Attarian

1. Introduce the Meyer/Williamson Accident Matrix into staff training.
2. Use the matrix to analyze a previous accident within your organization.
3. Design one method, such as a sentence added to your first-day orientation that informs participants of their responsibility in managing their own risk and that of others in the group.

### **Swiftwater Rescue 101**

Nate Ostis

1. Analyze present pre-trip briefing format and make an intentional decision as to what needs to be added, deleted, or modified to meet the needs of managing the risk on the specific rivers you travel on.
2. Incorporate hands-on experience with river rescue skills during each course briefing this year.
3. Design and implement a review process so staff can formally address their concerns as it relates to risk in the river environment.

### **Practices for Traveling in Bear Habitat**

Katie Baum Mettenbrink

1. Evaluate your bear practices using the Bear Awareness Triangle. Determine whether your staff have the tools to accurately assess conditions in each area of the triangle.
2. Pick one question in each area of the triangle that you can help your staff answer more effectively, and address those questions in your next staff training.
3. Determine whether staff or students could encounter red-light bear safety conditions on your program. Identify examples of green-, yellow- and/or red light bear safety conditions that could be encountered on your program, and consider whether your practices appropriately match potential conditions.

## LEGAL CONSIDERATIONS

Thursday, October 25

### **Chose Words Carefully...What You Say Matters**

Wilma J. Gray

1. Train your employees to be thoughtful about their verbal and written communication, by thinking about what and how it could be later interpreted.
2. Include challenging verbal scenarios in your staff training programs to help people learn to speak precisely and appropriately.
3. Have your staff review examples of written and verbal communication with an eye towards legal exposure.

### **Setting the Table: Fundamental Legal Issues**

Catherine Hansen-Stamp

1. In your next staff training, reflect on how you can make 3 discrete changes in your program to address legal exposure, based on your notes from this session. Assign those tasks to your staff, and have them report back. Circle back, prioritize and repeat the process.
2. Secure experienced legal counsel who can assist you in understanding basic laws and legal doctrines in your jurisdiction that affect your operation. Begin with 3 discrete areas (for example, the law that impacts your participant agreement, ADA compliance and applicable inherent risks laws), or if you are able, have counsel address a brief, but more comprehensive coverage of applicable law.
3. Review the key program areas of exposure. Identify issues, assess them, and respond. Use your common sense - if you've got a problem, fix it before you do it.

### **Essential Eligibility Criteria: A Risk Management Tool**

Janet Zeller and Catherine Hansen-Stamp

1. Arrange a short staff training or meeting to inform your staff about the importance of developing Essential Eligibility Criteria (EEC) and provide them with the telephone number and e-mail for their regional ADA Resource Center) office.
2. Select one activity your organization offers and develop EEC for that activity.
3. Distribute the newly developed EEC to your staff for feedback.

Note: You can repeat these last two steps until you have developed EEC for all of your organization's activities. You can then post the EEC for your organization on your website, with input, as appropriate, from your legal counsel.

### **Top 10 General Dos and Don'ts to Avoid Liabilities**

Tracey Knutson

1. Use the specific list of these ten continuing and emerging liabilities to analyze whether these exposures affect their programs.
2. After analyzing whether any of these 10 emerging and continuing liabilities affect your programs, then make critical decisions (based on the results of the cases discussed) whether your program has appropriate insurance coverage's and/or prophylactic documents and practices in place to deflect legal liabilities.
3. Based on the first two action items, your program should be able to update and evolve their internal policies and procedures to stay current with existing trends/issues in legal liability.

**Friday, October 26**

**Should I Call My Lawyer? Responding to the Angry, Demanding Client**

Frances Mock

1. Inform staff about the legal standard needed to expel students, whether you can search students' possession without their consent, and when you need to notify the police.
2. Consider types and amount of financial support you could offer to the family of an injured participant.
3. Inform staff about the urgency of responding to a Summons and Complaint (a lawsuit).

**Insurance Survival Tactics in 2012 -2013**

Mike Lucas

1. Share with a co-worker one new understanding of how the insurance marketplace works and how to navigate it.
2. Sit down with your insurance agent, and customize the program design provided to your organization's risk profile and financial tolerance for loss.
3. Choose one of the provided "Top 10 things your organization can do to improve insurability and control premiums", and implement it.

**New Developments in Participant Agreements**

Reb Gregg

1. Consult with your local attorney regarding the adequacy of your document.
2. Confer with staff regarding the clarity and accuracy of the document, particularly the description of activities and risks.
3. Compare the terms of your Participant Agreement with other organization literature, for consistency.

# EMERGENCY PLANNING & CRISIS RESPONSE

Thursday, October 25

## **Crisis Management: A Preplan in Action**

Drew Leemon

1. Build or utilize a simple template to develop a crisis management plan.
2. Identify key players in your organization who will be involved with crisis management and assign roles and responsibilities.
3. Run a crisis drill to determine current areas of strength and areas that need improvement in your organization's existing crisis response capabilities.

## **Field Emergency Decision-Making**

Deb Ajango

1. Create a realistic and intense simulation that forces participants to experience stress, to perform under stress, and to make difficult decisions while under stress.
2. Develop guidelines or a template for giving feedback to staff that incorporates methods proven effective for improving learning and performance.
3. Create a usable and effective checklist that can help guide employees through a field emergency.

## **Who Gets to Know What? Writing and Sharing Your Investigation Report**

Frances Mock and Drew Leemon

1. Discuss policy for whether or when you will conduct an internal investigation.
2. Practice investigating and writing up less significant incidents.
3. Discuss your philosophy for sharing information with leadership, your attorney, and your insurers.
4. Confer with counsel about the legal implications of your internal report.

## **Intellectual Risk: The Risk of New and Different Ideas**

Jason Luthy

1. During your next staff training, identify components in your curriculum which pose intellectual risk for your participants.
2. When facilitating, assess each type of risk and the "total risk" being experienced by your participants.
3. Compare the experienced risk to your intended outcomes.

Friday, October 26

## **Risk Management: The Traumatic Aftermath**

Will Marling

As an introduction to area of crisis response and intervention:

1. To identify emotional needs after a critical incident, risk managers should diagram the emotional impact to determine priorities.
2. To equip team leaders with skills to support victims, risk managers should introduce crisis intervention checklists to team leaders during training.
3. To promote physical and emotional health, risk managers should follow a self-care checklist with every managed incident.

## **Shades of Gray: The Complications of Managing Incidents Overseas**

Gennifre Hartman, Jennifer Royal and Leah Knickerbocker

1. Use tool found in WRMC Resource Center to assess one potential new location or potential activity in an international settings
2. Identify three possible red flags for overseas activities/course areas and create appropriate contingency plans.
3. Use tool found in WRMC Resource Center, create three scenarios for your next staff training, and send them to us by April 15, 2013. (We will send you a full group of scenarios back!)

## **Worst Case Scenario: An Expedition Leaders Response to a Fatality**

Jerry Isaak

1. Include at least a discussion of psychological first-aid in staff first-aid training. If relevant, include a psychological first-aid checklist in first-aid kits and/or emergency response plans.
2. During training, present a "worst case scenario" to the staff in your organization and discuss the possible "normal, natural reactions to an abnormal event."
3. Make sure that your field staff is aware of the incident response procedures that will be followed by the office in relation to contacting staff family members or emergency contacts.

## **Crisis Communication in the Facebook Age: Will They "Like" You?**

Bruce Palmer

1. Identify three to five questions that would likely be asked of your organization in a crisis.
2. Craft organizational and crisis message points unique your organization.
3. Practice two new methods of monitoring social media.

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