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Welcome to the workshop on Safety Briefings

Who is EW?

CD and GV introductions - include risk management related duties.

Basic briefing – bathroom, encourage questions and participation

**Handout:** *A Guide to Field Briefings*



**OBJECTIVES**

- 1** What is a culture of safety?
- 2** What is a robust on-site safety briefing?
- 3** Practice!

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This presentation has been adapted from a training we provide our field staff. It has been very useful for us, so we are sharing it with all of you.

Today, we will cover three things:

1. Discuss the importance of developing a strong culture of safety.
2. Describe one element of our culture of safety: on-site safety briefings and how to make them an effective tool.
3. And practice giving safety briefings.



1 Culture of Safety

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**Brainstorm Question:** What do we mean by “culture”? What is a “culture”?

**Facilitator Notes:**

Culture is defined as the attitudes, beliefs, perceptions and values shared by a group.

These values are so instilled from the start that they are often held sub-consciously: it is just how things are done.

That is how we want safety to be viewed at Earthwatch.

With everyone in the Earthwatch family - participants, project staff, Earthwatch staff and facilitators - we are building our culture of safety from the very start of their Earthwatch experience.

We aim to set the tone from the first point of contact that safety is a way of life at Earthwatch and continue to build from there.



**SET  
REALISTIC  
EXPECTATIONS**  
Prior to the Experience

**What touch points  
does your organization  
have with participants  
before they arrive?**

- Expedition Briefing
- Participant screening
- Participant preparation
- Code of Conduct
- Liability Release

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**Brainstorm Question:** What are some of the tools your organization uses to set realistic expectations for participants?

Long before the participants arrive in the field, the culture of safety begins with setting expectations appropriately.

We set the tone that safety is important to Earthwatch from the moment a potential participant visits our website, all the way through to his or her time in the field.

By doing so, we are drawing that participant into our culture of safety.

Setting expectations well is achieved through good communication; for Earthwatch, that means accurate descriptions of the projects, **transparency around the field conditions**, keeping participants informed of changes, and so on.

But Earthwatch needs help from the people who know the projects best – our scientists and project staff – to be sure our materials like the project briefing, web descriptions and photos represent the projects as accurately as possible. And to carry through with building upon the culture of safety in the field.



As an team leader, it is up to you to create the team “culture” that will shape the attitudes of the participants and other staff in the field.

This culture will last for the duration of each team, from day 1 to departure, so it is important that you build a culture that values safety and learning.

## SET THE TONE

**AT THE START**

- Project staff must give a thorough safety briefing
- Promote a supportive atmosphere that values safety & learning
- Encourage open discussion of questions or concerns
- Set the tone that safety is a way of life in the field
- Communicate clearly



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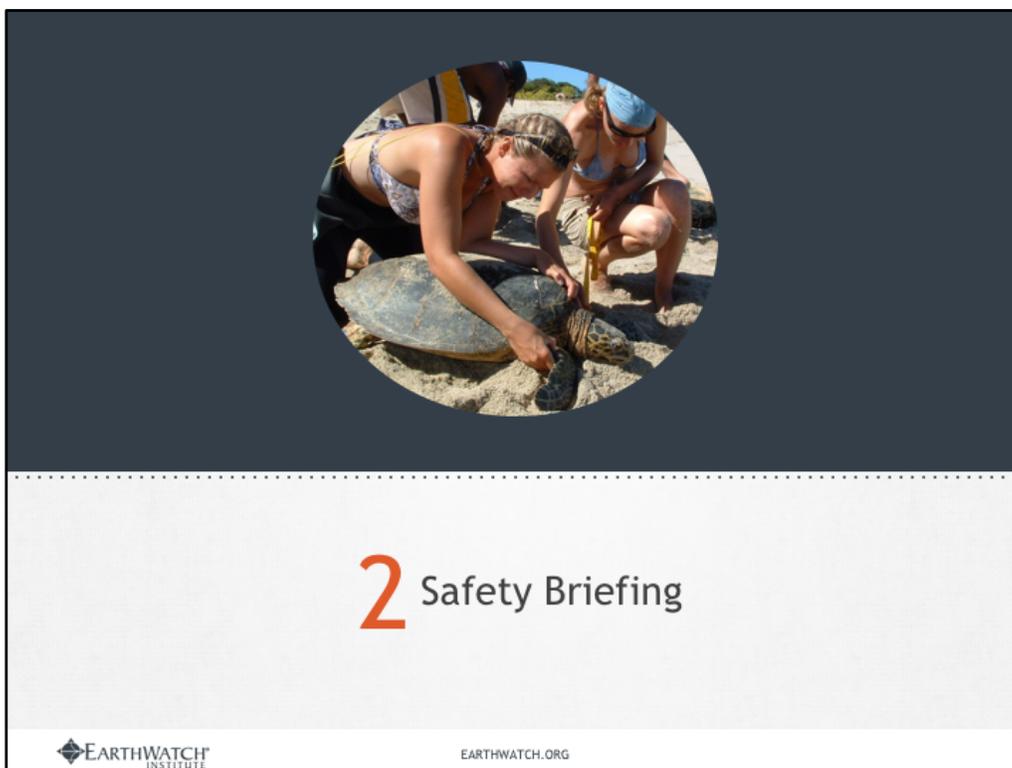
Frequent and clear communication between administration and field staff is a must. Although project leadership is responsible for establishing a culture of safety in the field, it is essential that people in the office are supportive and embrace the open discussion of safety issues or concerns. You can help set the tone from the office with every communication you have. You can help draw people into a safety culture through honest and open discussions about the practicalities of living and working in the field.

### **Facilitator Notes:**

Start the team off right by drawing participants into the team culture from the moment they arrive.

Foster a communicative and supportive atmosphere where each team member looks after themselves and each other. Encourage an ongoing and open dialogue where participants feel comfortable coming to you with questions or concerns.

Doing so will help you head off issues before they become problems and allow the team to bond over their reason for being there – the research.



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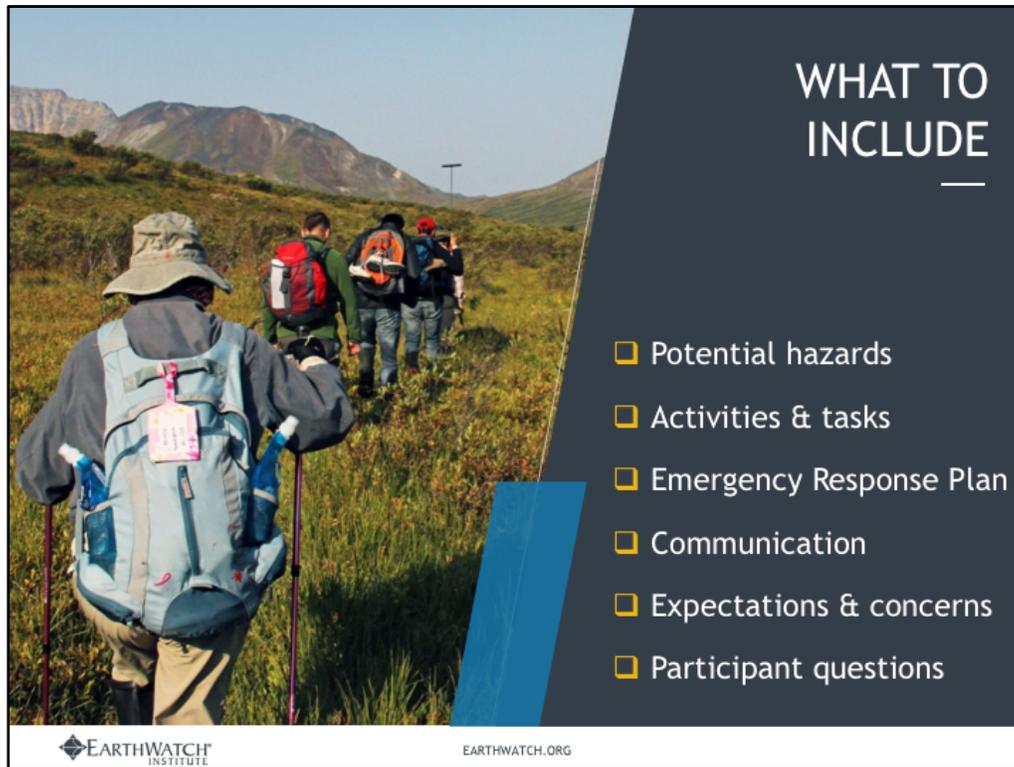
There are many ways to pull participants into your culture of safety. We find that one of the most important ways is through a well thought-out safety briefings on the ground.

With a show of hands:

How many of you use a pre-planned safety briefing on your program?

How many people have witnessed a BAD or inadequate safety briefing? (example from crowd)

Safety briefings may feel like common sense, but it is creating structure and implementing it into your staff training that is the difference between a ok/not-so-good briefing, and one that can really serve its purpose.



To do that you need some tools.

Here is a checklist we follow. This outline is the same for every one of our programs, even when they are very different from one another. These are general topics.

Obviously, we include hazards. What should participants look out for.

Different activities will require specific instructions – especially if participants are doing them for the first time. We have experts or locals leading programs, and they can often forget what is 2<sup>nd</sup>-nature to them, is completely new and potentially difficult for another person. For this reason, we break activities down.

How many people have emergency response plans? We have hard copy Emergency Response Plans in the field intended to be tools for any person on a team – including participants. But, they are only useful, if participants know where they are and how to use them.

Sat phones, radios, cell service, areas of no comms, chains of communication – all must be described so when information flow needs to happen it can do so smoothly.

A supportive and encouraging conversation about expectations and concerns. This is your opportunity to help align expectations with actuality, calm fears and establish an open, honest dialogue for a more successful team.

And of course, encourage questions, clarify and address people's specific needs.

So these are the bones of an Earthwatch on site safety briefing. Your checklist may look different, but having one as a starting point is very helpful.



We have outlined a rough agenda, how do you make it work?

**PLANNED AND DELIBERATE:**

- On-site safety briefings are a required, formal part of delivering an Earthwatch expedition, and it is included in our training for our scientists. If the structure is there, it is more likely to happen. This places importance on it for participants.

**BASED ON RISK ASSESSMENT:**

- How many people have documented risk assessments for their programs? We create Risk Assessments for each project. It covers risks like: weather, terrain, research activities, animals, diseases present, etc. It also includes our plan for reducing each risk. We draw directly from this document to create the content for our on-site safety briefings. We don't list off every single item, but rather focus on the risks that are unique to the program and the most common. This way, nothing is missed, it is thorough, and we are keeping participants informed. It fills in gaps if they have not read materials.

**TIMELY:**

Timing is key. Schedule a specific time in your program itinerary. At the start of a program, before activities begin, but after people have rested, recovered from jet lag, had a meal. Allow time for informal briefings and reiteration throughout a program. Plan a specific briefing for each new activity, especially if it will not happen for several days. (\*i.e. trapping on day 6)

**RELEVANT:**

- Even though we have these checklists and tools, every safety briefing must be tailored. Think about what the program entails, where you are, and who you are with. Consider your audience, their backgrounds, their age, and their experience with your location and activities. Is there a mix of experience/ Are they novices? Are they from a different climate or country?

PRACTICAL:

- Make sure participants know – not only what can go wrong, but what to do IF something goes wrong. Participants should know how to behave in different scenarios, where key items are located (ERP, Comms, first aid kits etc.). Have you used a Sat phone before? If not, show people. Make it as interactive as possible.

EMPOWERS PARTICIPANTS: Most of all...

- Help participants understand that they play the biggest role in keeping themselves safe, and they have a responsibility to their teammates because one person's actions can affect the safety of the whole team.
- Use respectful, clear communication. Use a tone that balances the serious nature of the topic, but also be an open conversation.
- Be friendly, transparent, and open – so it encourages participants to also be open. A safety briefing is an exchange of information.



Now, we will take a deeper dive into some types of hazards. We have discussed several items to include in a safety briefing, but hazards are a main focus, so we will take a bit more time thinking about them.

Think about your program, of if you have many, choose one. I am going to show a handful of categories. For each category, write down 1-2 hazards associated with it relevant to your program.

There may be a little overlap between categories as you brainstorm, but that is OK. The goal is to build a list of hazards for your program to prep us for our activity.



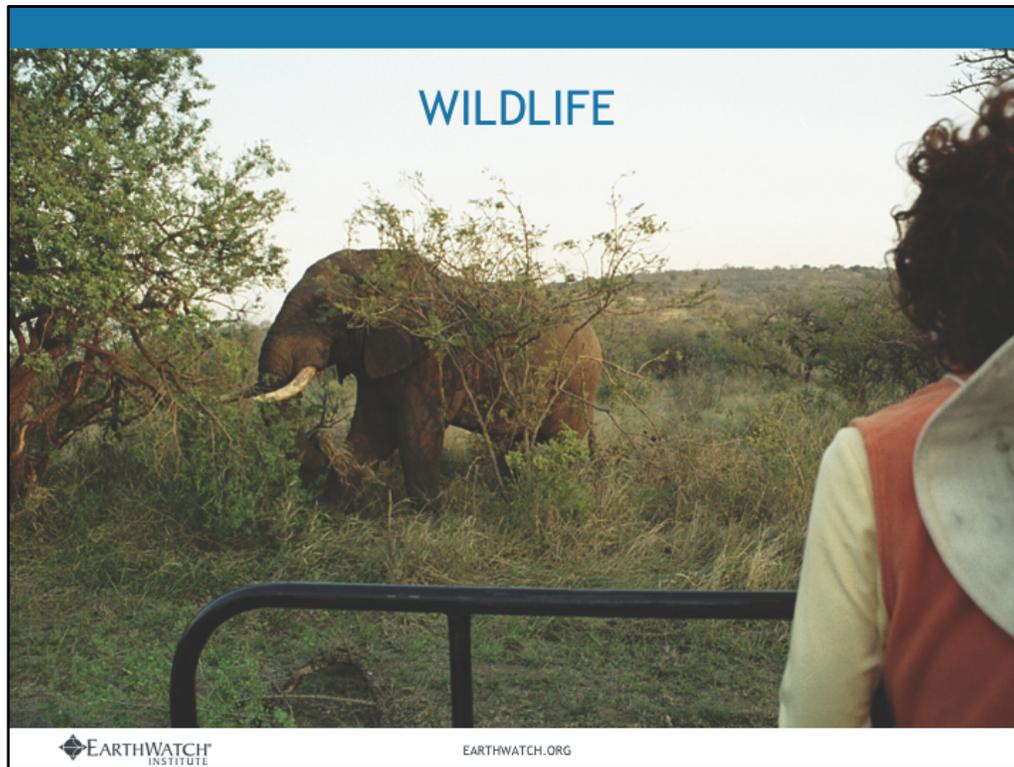
- Different locations have unique terrain, such as this one. This is the Chabut Peninsula in Patagonia, Argentina in a penguin colony. Those holes are dens.
- Twisted ankles and injuring penguins are big concerns here.
- Participants are taught how to traverse this delicate landscape. Walking sticks can poke through shallow earth and injure a penguin or egg.

What terrain do you work in? What hazards does the terrain present?



- We must consider the elements. Heat, wind, storms, flooding, unseasonable or unusual weather for a given time of year. All of these conditions are useful to talk about with participants. This is Churchill, Manitoba on a climate change project.
- Here there is the risk of extreme cold: hypothermia, frost bite, chapping and cracking of lips and hands, and other cold-related injuries, as well as cold-caused damage to gear.
- Participants are taught how to suit up in proper clothing and gear, which is absolutely essential.

What aspects of the environment do you need to inform your participants about?



- Wildlife – big and small. In some cases, you will be worried about insects – especially disease-bearing ones. In other cases, such as this one, you will be looking out for large animals that can really hurt you. (Majete Wildlife Reserve in Malawi)
- Elephants can be docile, but they can become agitated or provoked which is very dangerous.
- Participants are taught how to behave when elephants are sighted or close by. They are also taught how to recognize signs of irritation in the elephants behavior. What is the proper following distance to keep on foot versus a vehicle? When is it OK to move about, versus stay still?

What wildlife could pose a threat to your participants?



- Sometimes the very activities we are asking our participants to do are risky.
- Currents, rip tides, changing tides, and water visibility can all put snorkelers at risk.
- Here we conduct basic swim skill tests on day 1, practice snorkeling in shallow water, teach people how to maintain their gear, and use the buddy system.

Do your required activities present risks to your participants?



- We all use equipment of some kind. Camping equipment, cooking equipment, climbing gear, safety gear...etc. We train our participants to use research equipment, such as this pit tag.
- A pit tag is an ID tag used for tracking individual animals. It is inserted with a plastic device with a trigger that has a sharp metal insert. The quick release of the device and the sharp pieces can cause injury to people and animals if not used properly.
- During this safety briefing, Technicians demonstrate what to do, participants practice on a giant stuffed turtle and then they practice with taggers unloaded. Instructions are repeated in the field with high supervision.

What equipment on your program would include in your safety briefing?



- Transportation is one of our main concerns in the field. In this case, in the remote Peruvian Amazon, participants conduct research from many types of boats - Everything from a large riverboat to dug-out canoes.
- There are many hazards in the water in the Amazon (Caimen, piranhas, boas, parasites...) and this program is at least a half a day from help.
- Here we instruct people how to fasten their life vests, board between boats, how to step into some pretty small boats - somewhat unstable canoes. We teach them how to stay in the boats! No swimming or entering the water is allowed.

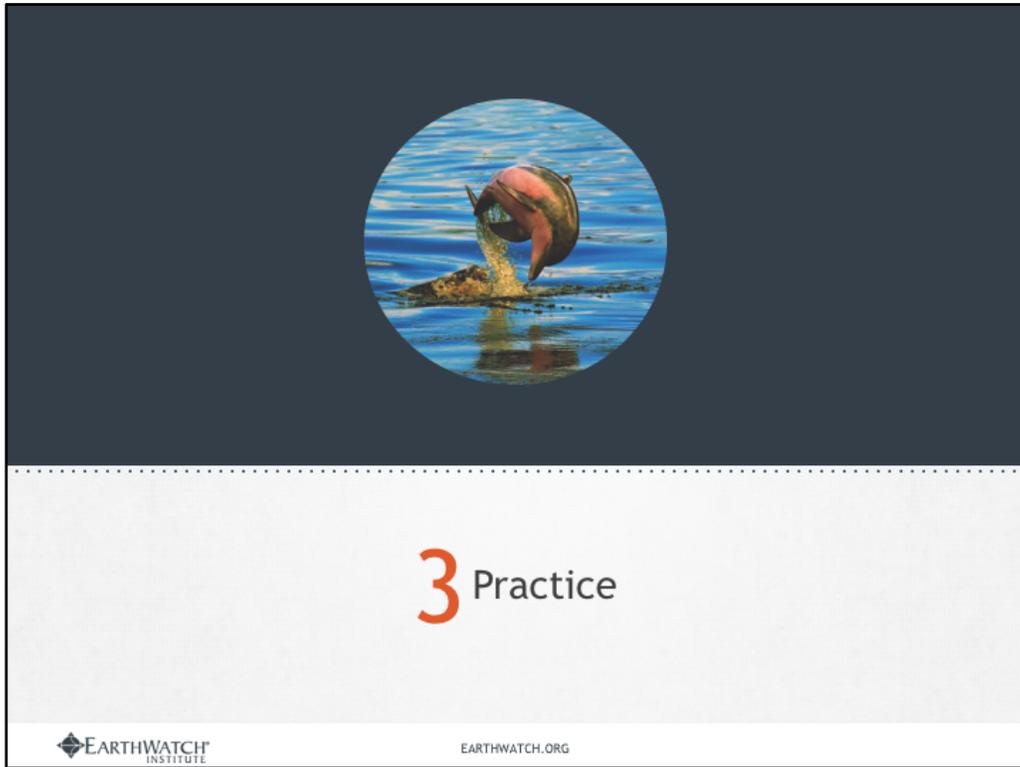
What special considerations are there for your mode of travel?



- Whether your program is national or international, we must consider local culture. Teach people what kind of behavior is expected.
- This is Mongolia and here in this community, if you are invited into a home (a ger), don't hesitate at the doorway – walk right in. It will call into question their hospitality.
- Talk with participants about what is OK and not OK? How should they dress? Will they see things that they find unusual? Help prepare them. It helps prevent misunderstandings, and paves the way for more meaningful connections.

Are there specific cultural elements of your program that you should include in your safety briefing?

Now you each have a list of hazards for at least one of your programs, and we will use that list for our activity.



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## ACTIVITY

- Divide into groups of 5-6
- Select one hazard from one of your programs
- Work together to create a short safety briefing for this hazard. Be sure to:
  - Clearly identify and describe the hazard
  - What are the mitigations in place?
  - What can participants do to minimize the hazard?
  - Provide instructions for what to do if something goes wrong
- Nominate one person from your group to present to the room

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Now that we've established that one of the most effective ways that you can set accurate expectations, and start creating a culture of safety from the very start of each team is to deliver an informative and empowering safety briefing to the volunteers, let's take some time to practice that skill. We are going to do an activity that will require you to split into groups. Please take a moment to split into your teams.

Once you have chosen your hazard, work with your group to come up with a short (no more than 2 minutes) description of the hazard and how it can be managed in the field – how you would describe it in a safety briefing. Have someone write this down. I will need a presenter from each group to come up front with me once you're done. You have 15 minutes to discuss and create your description, and I will give you 5-minute and 1-minute warnings.

Can give their examples from where they are standing.

Have handouts with examples in case someone needs an idea.

Extra paper and pens.



## HOMEWORK

1. Define your organization's Culture of Safety
2. Create a list of hazards to include in your safety briefing
3. Use staff trainings to practice safety briefings

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Gitte – hand out handout

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THANK YOU

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