

# Walking Towards the Storm



Lessons from a Crisis

## Welcome

Let's get started. Thank you for joining us today. And thank you NOLS + The Steering Committee for organizing this conference.

My name is Tom Costley, and I'm here with my colleagues from Overland to talk about an incident that happened on one of our trips in 2013.

I want to start this afternoon by telling you a bit about our presentation, its format, and the rationale behind it. We're going to tell you the story of this incident from each of our perspectives. This approach will likely be different from most presentations you've seen here. Rather than taking an analytical approach, we're going to tell you what happened, how we responded, and what we learned.

The story we're about to tell you, is one of terrible loss, and we're going to tell you about it from a deeply personal point of view.

Why this approach?

As we look out at this audience we see people who lead the risk management field. We have a story to share that could help you to understand how it **feels** when you are faced with an incident as we were in 2013.

**Emily:** I first started at Overland in 2007 as a bike trip leader. During my four years as a bike trip leader, I led two trips across Europe, one from Edinburgh to Nice and another from Amsterdam to Barcelona. I also led the American Challenge twice, our cross-country bicycle trip. In 2012 while leading the trip I biked on the exact road

where this incident occurred. At that time I was leading Tom's daughter, Cate.

In 2013 I was working full time in the office, as one of the directors. I was focused on admissions. My lens on this is colored by my work in admissions, talking with families on a daily basis about their students signed up for trips.

**Jonathan:** My name is Jonathan Igoe. I was a Director for Overland in 2013 as I am today. I came to Overland through my wife who was a leader in the 1990s. I was focused on hiring our leaders and knew all of them well from the hiring process and leader training. Both of the leaders on this trip were returners so I knew them especially well. The group of us all worked together on risk management over many years and especially that spring with Cathy.

**Alec:** My name is Alec Norton. I led bike trips for Overland, including the American Challenge, and worked as a trip planner in the Overland office. I worked with Jonathan, Emily and Tom on our risk management plans and our review of biking routes.

**Tom:** What was about to happen to us—individually and collectively—would change our lives forever. Without the wise counsel of outside professionals—as Alec noted—we would have been lost. With it, we had a roadmap, and we had caring, committed professionals to guide us.

Okay, before we start, let me tell you about our format today.

We're going to stop twice for questions.

The first time will be quick—just questions, if there are any, to clarify the narrative.

The second time we stop, we invite questions about anything and everything.

We will share our story from four perspectives. When it comes time for questions, we invite you to ask us individually or as a group.

**Emily:** Before we start, here's some useful information. Every summer, Overland offers hiking, biking, service, and language study trips to students ages 9 to 18. Our students come from across the country, and they join us for one, two, three, or six weeks. An Overland group is limited to twelve students, and there are always two leaders. Our leaders carry cell phones, but we our students do not.

**Alec:** The incident in Arkansas involved one of our American Challenge groups--that's our name for our 3,200 mile coast-to-coast bike trip. In the summer of 2013, we had four groups on that itinerary, one a day ahead of the group affected, and

two trailing it by a couple of days. In the story we're going to share with you, a distracted driver plowed into one of these groups, striking six students and one leader. One of the injured students died the next day as a result of her injuries.

**Jonathan:** In 2013, 2,500 students joined us over the course of the summer. At the time of the incident, there were about 900 students in the field. 1,600 were slated to join us in the weeks that would follow.

**Tom:** There is much to tell here, but we have focused only on the essentials of the story. As I said a moment ago, at about 45 minutes into the presentation, we'll pause for questions-- let's use this time to clarify any questions about the narrative, then we'll finish up, and open up for general questions. Okay? Any questions before we start? All right. Let's go.

## Day One: Tuesday, July 2, 2013

### The Call

**Emily:** On Tuesday, July 2<sup>nd</sup>, 2013, at 5:35 pm a call came into the office. I was just about to walk out the door but I lingered for a second to see who was calling. Then, I could see that my colleague on the phone became visibly upset. I could feel a pit in my stomach and walked over to her desk. I heard my colleague ask: "What happened? Where are they? Who was involved?" I could only hear bits of the conversation—"Arkansas, ambulance, helicopters."

**Jonathan:** There was so much that we didn't know at this point. It felt like we were operating in a dark tunnel. The basic facts were important and we tried to get those down as efficiently as possible.

- Exactly where they are.
- Who the students are.
- The extent of the injuries to each of them.
- How the incident happened.
- What's happening right now?

The important first step, after calling in all of our year round staff (about 16 people) was to divide our team and our office space in half: half focused on Arkansas, the other half focused on all of our other trips in the field.

**Alec:** In Arkansas, one of our trip leaders was badly injured, the other, Mike Bienkowski, was not hurt. He was our only source of information, and he was understandably shaken as he tried to manage a lot all at once. Over the first 30 minutes of the incident, Tom led a series of calls with the trip leader while I and another staff were on the line taking notes, focusing on recording the basic facts.

Even details as small as where to keep this information and how to organize it was challenging in the face of the situation and what felt like a constantly changing flood of details.

**Tom:** I can recall being on the phone and pushing Mike hard to get the specifics of each injured person's condition. It was all bad, he said, really bad, but our focus quickly narrowed to one of the students, Merritt Levitan.

## Day One: Tuesday, July 2, 2013

### The Flight

**Alec:** I remember discussing a few of the crises situations from *Lessons Learned* with Tom on a bike ride that spring, and Tom saying that if we ever found ourselves in a similar situation he would need to be on a plane almost immediately. We quickly checked flights for that evening-- we needed to get to Memphis, Tennessee-- nothing. Not from our closest airport-- Albany, New York, and not from Boston, a three hour drive away.

**Tom:** I can recall being on the phone with Merritt's dad, Rich Levitan. I told him we couldn't find any flights for him or for us so we'd charter a plane and pick him up. He thanked me. Then he told me it looked like Merritt wasn't going to make it. I don't know what I said. I hung up. The entire team was staring at me. I told them. At that moment, each of our lives changed. Our relationships to each other changed. And our relationship to Overland, and to the work we loved, changed.

**Alec:** Despite having recognized months before this incident that we might need to charter a plane, we hadn't taken the time to research charter companies or brokers. At 7:00 p.m. the clock was running, we needed a jet, and we were starting from scratch.

**Tom:** Two hours later, we still didn't have anything. Rich called-- what's the plan? I told him we were working on it. He asked if he should look into other options. I told him no, we'd get it organized.

**Alec:** At about 9:00 p.m. we chartered a jet-- but then the jet needed fuel and

pilots. So, we waited, and waited, and waited.

**Jonathan:** Chartering the jet was just one of the things we were working on at the office and we had two staff members focused on that, making calls, and getting information out to the charter companies and back to family members who were planning to fly. At the same time, we were in touch with other family members, some of whom had heard from medical authorities before we had gotten through to them. We recorded everything in a Google Doc, but also put the names and status and location of each group member on the big white board in our office. I needed to see the names to make sense of it.

**Emily:** Earlier, it had been decided that I would go to Arkansas with Tom and his wife, Liz. The injured students were spread out at different hospitals. We made a plan that Tom and Liz would go to Memphis with Merritt, and I would go to Little Rock where another student had been airlifted.

**Tom:** In the middle of the night, the jet touched down, and rolled over to where we were standing at the edge of the taxiway. It had come from Boston where Rich Levitan, his fourteen year old daughter, Hunter, and his twelve year old son, Joe were on board, along with the parents of the injured leader, and the mother of one of the injured students. We climbed up the stairs. I walked to the back, and sat down next to Rich. He turned to me, shook my hand, and said, “How are you holding up?”

## Day One: Tuesday, July 2, 2013

### Overnight at the Office

**Jonathan:** In the office, we were focused on gathering information, and reaching out to the parents of every student on the trip. We knew that we would have to inform all of the other Overland families of the incident-- that's about 2,000 families-- and we'd have to inform our 200 leaders in the field. We needed a communications plan and a plan for how we move forward with all of our other leaders, our groups in the field, and families.

**Alec:** We immediately decided to staff the office overnight knowing we'd have to be ready to respond to calls or email.

At 9:52 pm-- KATV Arkansas reported on the incident.

At 10:46 pm an email arrived from CNN asking specific questions about the Arkansas Cycling Collision.

**Jonathan:** We worked with Cathy Hansen-Stamp and our attorney in Massachusetts to draft an initial statement for our website which we posted at 11:30 pm. At 11:45 pm we emailed all of our leaders around the world. At 12:30am someone from the Today Show called our office. We directed them to the statement on our website. At 12:40am we sent an email to the families of all enrolled students for the 2013 season. We then sent a separate --and different-- email to the 36 families of the other three groups of cyclists who were riding across the country on the other sections of the American Challenge.

**Alec:** Tom had contacted Cathy Hansen-Stamp about an hour after the first phone call from Arkansas, alerting her that we would need her assistance. Cathy went



above and beyond that night -- in numerous phone calls and emails -- providing feedback on initial statements, emails, concrete recommendations on PR firms (Fineman PR) and next steps, and overall support. At Cathy's recommendation, at about 12:30 am we connected via email with Bruce Palmer, who was then at NOLS. We sought Bruce's guidance for talking to the media. The first seven hours of the incident, from the initial call to 1:00 a.m., was a blur of conversations, emails, and phone calls. Jonathan and I went home at about 2:00 am to get some sleep. Three staff members stayed at the office overnight.

## Day Two: Wednesday, July 3, 2013

### The Hospitals

**Emily:** The flight was thankfully short. There were ten of us crammed in a small cabin. All there for the same, tragic reason; all connected by worry, and grief, and all just wishing we were already in Arkansas. I sat next to Liz on the flight. She was squeezing my hand. I imagine she was squeezing Tom's hand on her other side. The jet touched down in Memphis at about 3:00 am Central time and we all piled in black SUV limos and scattered. My job was to get to Little Rock to be with a badly injured student. Little Rock is two hours from Memphis. Throughout the drive, I desperately tried to stay focused on the next steps - the task ahead - so I didn't get overwhelmed with emotion. I needed to get into the hospital and up to the student's room. His family was still hours away from arriving, and he was alone, in a hospital, surrounded by strangers.

**Tom:** Liz and I went to the hospital in Memphis where Merritt was being cared for. We were told to wait in a hallway. Merritt's room was through a pair of heavy automatic doors about 50 feet away. We never saw Rich or Hunter or Joe. We still hadn't met Merritt's mom, Anna. She'd somehow talked her way onto a private plane in Saint Simons Island, Georgia, and gotten a ride to Memphis.

## Day Two: Wednesday, July 3, 2013

### The Office

**Jonathan:** Alec and I returned to the office at 6 am on Wednesday, July 3. At this point, we had 71 groups in the field from Alaska to Tanzania.

**Alec:** We connected with Bruce Palmer. He recommended having one person-- that would be Jonathan-- handle the media conversations, and then, have another person schedule the media calls in 30 minute blocks. Bruce advised us to be accessible, he encouraged Jonathan to have his talking points clearly written out and to stick to them while being human and expressing concern. Bruce was so helpful. He reassured us: "This is difficult," he said. "You just have to get through it."

**Jonathan:** Actually, I remember Bruce saying to me, "This sucks, but you'll get through it." I knew that I could do these calls, and that communications with the media, with our families and with our leaders is where I needed to focus my attention.

Media requests came in from CNN, the Today Show, CBS 6 Albany, the Associated Press, WBZ Radio in Boston, Fox and ABC in Little Rock, the Boston Herald, and Channel TEN/ Fox in Albany, as well as the Diane Rehm show.

We responded to every media request promptly and set up times to speak with each organization. I took Bruce's advice: all calls from the media were directed to Alec first and then I called the person back at the designated time, appointments each half hour..

Being new to this, I found this system extraordinarily helpful because I was in control of the timing of these calls and could prepare myself. I also found that they often asked the same question twice in different ways, looking for some kind of hook for their story or some new information. For example, after going over the basic information, they might ask: "Do you believe the driver of the vehicle was intoxicated?" I would answer: "We don't know anything about the driver of the vehicle and at this point, our focus is on our students and the leaders." The follow-up question was typically something like this: "But given the road conditions and the time of day, what would have caused the driver to crash into your cyclists?" I would answer: "We still don't know anything about the driver." It's essentially the same question and this was a realization for me that gave me confidence because I felt like I had figured out how it worked. These folks are professionals and they knew what they were doing. If I stuck to my talking points, after I got the question the second time, they would move on.

**Alec:** At 11am, we posted an updated statement to the Overland blog which we will look at later in the presentation.

## Day Two: Wednesday, July 3, 2013

### The Hospitals

**Emily:** When I arrived, I walked into the main lobby of the hospital, went up to the desk and asked for the room number. When I got to the room, I was greeted by a goofy, teenage boy. He was hooked up to an IV and monitors, and very obviously in pain, but did his best to keep a smile on his face and make jokes. Only after his mother arrived was the severity of his injury fully revealed and he was rushed into emergency surgery. I spent hours outside the operating room next to his mom: we made some small talk, but mostly we just sat in silence. We went to the hospital cafeteria at some point and had lunch. I don't think either one of us was hungry. I had never been through anything like this before. In preparing for a summer, you don't talk about how to sit next to a mother whose son is undergoing emergency surgery.

**Tom:** After a couple of hours, a doctor came from the direction of Merritt's room. She approached Liz and me. She introduced herself as Merritt's neurosurgeon. We were desperate for information, and I'm sure we looked it. All she said was: "I am so sorry."

## Day Two: Wednesday, July 3, 2013

### The Hotel

**Tom:** Liz and I checked into a hotel in Memphis. We put our bags in the room. We never used that room. The next time we'd be there we'd be leaving Memphis to go home. Of course, we didn't know that at the time. We walked downstairs. Rich was in the lobby. We approached him. He said, "She's not going to make it. We're calling family. We're going to take her off of life support tomorrow." I burst into tears. Later that day, I called our attorney in Massachusetts and told him that I'd dissolved in tears in front of Rich-- *I told him that I'd stood in the middle of a Marriott in Memphis, Tennessee, sobbing, and that Rich Levitan had comforted me.* I thought I was at the bottom. But I wasn't. There was a long way to go.

## Day Two: Wednesday, July 3, 2013

### The Students in Arkansas

**Emily:** By now, the uninjured students and Mike, the uninjured leader, were in the home of a couple who had never met these students, or this leader. When the call came in the evening before -- from that leader about the accident -- there was the immediate (who is involved? what hospital?) but then there's the rest of the group to think about. All of us in the office had racked our brains. Who do we know in Arkansas? Do we have any leaders from the area who may have connections? I had led this trip two summers before and combing back through my notes, I remembered that a family in the area had helped our group out in the past, when a campsite had been flooded. We found contact information from years before, and with fingers crossed called the only number we had for them hoping they would again open their home. They did more-- so much more- than just open their home to us.

**Tom:** Seeing the kids in Arkansas was hard: they going through hell and they looked it. Liz and I did our best to connect with each of them. Amazingly, our hosts --these people we didn't know, who had no connection to us, or to Overland-- were terrific. They called in friends and neighbors, the house was full of food, and they did whatever they could to comfort the kids.

**Jonathan:** While no one in the group had asked for support services, we knew that we had to provide resources to the group should anyone want --or need-- to talk to a counselor. So we began working on arrangements to have a counselor available for the group in Arkansas.

## Day Two: Wednesday, July 3, 2013

### The Question

**Alec:** One of the moving pieces at this point was what to do for the group of students in Arkansas who were able to continue riding. They were high school students who had planned all year, or for some of them, multiple years, to complete this ride across the country. They had trained and prepared for months. They were completely invested in it.

**Jonathan:** Internally, we discussed options. We could send additional staff to Arkansas and give the group the opportunity to complete the trip--we knew that some of the students would give anything to complete this ride. We also knew that if we canceled the trip, that some students might ask to join one of the other three groups biking cross country.

**Tom:** Liz and I were torn-- we hadn't slept in 36 hours: we were physically and emotionally shot. How were we supposed to make these decisions? I can recall talking to the office, hearing the guidance of Cathy Hansen-Stamp, and of Michael Fineman and his team. After hours of an excruciating back-and-forth, I called the kids together and told them: I was cancelling the trip. One of the boys, a brilliant kid, stared daggers at me. But he got it. I'd made my decision and it was final. The trip was over. This kid-- maybe he's sixteen at that point-- then calls the rest of kids together and tells them to get their bikes, they're going for one more ride. I watched them roll down this quiet, shady street in rural Arkansas. It was late in the day, the sun was low in the sky, and a soft-edged golden light lit them from behind. It was one of those beautiful moments in your life when you somehow see that as bad as everything was at that point, that somehow we'd get through this.



## Day Two: Wednesday, July 3, 2013

### Media & Families

**Jonathan:** The interviews with media continued over the course of the day. Tom and I spoke many times to discuss how these were going and how we were holding up. I urged Tom not to discuss how challenging it was to cancel the trip with the media. Just say that we made the decision in the interest of all involved. Be decisive. This was a complicated decision for us at Overland, but we don't need to go into that with the media.

**Alec:** In the office, we contacted parents of the group members about the decision to cancel the trip. These were difficult calls. Parents were upset, some were angry. They wanted to have a say in the decision. Some accused us of canceling the trip for PR reasons. They wanted to know how there would be closure on this. Some asked what we would do for this group. We had our talking points and tried to stick to them, but also needed to respond to questions and hear these parents express their disappointment and anger with Overland and the entire situation. We decided to tell parents that we were going to refund them their trip fee. Initially we said that we would offer a partial refund. We quickly realized that we needed to do more.

**Tom:** This was a painful mistake-- and it was all on me. Once I'd realized I'd made a mistake, we refunded all of the trip fees and bought all of the kids flights home. We were hemorrhaging money but I'd come to the realization that it didn't matter.

**Alec:** Meanwhile, the office staff was working hard to logistically support our decision to cancel the trip. By 9:30pm we had two staff members working directly with families on travel arrangements to get the kids home.

**Emily:** I left the hospital after the surgery was completed to join the group. The house was small, and our students' gear was spread out everywhere. The hosts and neighbors were buzzing around, making sure everyone had enough food. Everyone was exhausted or in shock. The kids were being doted on and at that point, they didn't know me any more than they knew the hosts. My focus was on our leader who was there. Anyone who has led knows what that responsibility feels like - and although unwarranted, I couldn't even imagine what he must have been feeling. He was trying to keep busy, stay focused. After checking in with him as best I could, I went out back to where all of the bikes were spread across the yard. Bikes decorated with stickers, orange safety flags, some had tassels or animal horns. The bikes of teenagers who just 24 hours ago were happily pedaling their way across the country. But then there were a few bikes - steel and aluminum - solid frames - that were badly mangled. I was glad no students were out there at that moment, because the last thing I wanted was for them to see me crying. We needed to ship all of those bikes to Williamstown - especially the ones involved in the accident. We had no idea if we would need them later. Would the insurance company need them? Would the prosecutor or an attorney need them? I went to work trying to find a way to box the bikes - all of the bikes - including all the damaged ones.

**Tom:** The local television station in Arkansas contacted our hosts and asked me for an interview. My first thought was "No way." I called the office, I called one of our attorneys. Everyone said do it. I'm thinking, easy for you to say. I went out into the back of the backyard and paced back and forth, asking myself questions out loud and then answering them out loud. Over and over, practicing, trying to get it so that I could keep it together, determined to keep the focus on the support everyone in Arkansas had shown us-- the first responders, our hosts, their friends and neighbors. I knew I wanted to end by asking for thoughts and prayers for Merritt and her family. I saw the TV crew pull into the driveway. They got set up. I walked over, said hi. They did their thing. I don't remember a bit of it.

**Jonathan:** I used a separate, quiet room in the office where I could close the door and focus completely on these interviews. No distractions. I had my talking points broken out into 4 sections based on what I expected the media would ask: what happened, what was our response, who were the leaders of this trip and what is Overland.

Having a 1 pager in front of me was helpful. Being in a quiet space was essential. Calling every reporter back at the designated time made it feel like we were partners in it. Alec and I felt like we were able to stay ahead of and on top of the communications and I was grateful for his work with me on this.

I was asked what we were going to do about the trip, would it continue? I remember saying, "Oh no. We're focused on getting all of these students home." It

was a perfect answer - reasonable and respectful of the situation. There was no follow up question or discussion about that decision.

On one of the late night or pre-dawn drives to or from the office I heard myself on NPR. It was a brief sound-bite, maybe 5 or 10 seconds of me talking about the incident, expressing concern and praising the local response. I remember thinking, "he sounds tired."

**Tom:** Late that night-- maybe 11:00 or so Arkansas time-- I'm on a lousy cell phone connection talking to a furious parent of one of the kids who's asleep on a couch in the next room.

**Jonathan:** Let me chime in here with some context. These phone calls were hard and what we realized immediately was that some of the parents could only see the situation from a narrow perspective. Some of the parents were focused only on their child's summer trip. They did not recognize that this was a much larger life event.

**Tom:** I can still hear the exchange in my head, I can still hear myself saying: "You don't get it. These kids need to be at home, they need to be hugged by you."

## Day Three: Thursday, July 4, 2013

### Telling the Group

**Tom:** The kids didn't know that Merritt was going to die. I knew I had to tell them. But I didn't want to. I tried to get some sleep. And then, sometime just past midnight-- I can't remember when-- Jonathan called.

**Jonathan:** We knew from Rich that Merritt was going to be taken off of life support. Rich had told Tom directly but the information was not public. We had a narrow window to do this. I called Tom knowing he had not slept in days. I told the person who answered the phone to wake him up. We had to talk. I waited on the phone. Eventually, Tom got on. He agreed with me, but we did not know how to approach this. We knew we could not contact Rich at midnight. Tom decided that he would call Rich at 6am the next morning.

**Tom:** In the morning, I called Rich and woke him up. I asked him. He said, yes, please, tell them, and tell them that if they want to say goodbye, to come to the hospital. Liz and I woke the kids up, brought them together, and told them. It was awful.

## Day Three: Thursday, July 4, 2013

### Saying Goodbye

**Tom:** When we told the kids that Merritt was going to die, we gave them the option of going to the hospital in Memphis to say goodbye to her. Some said yes, others said no.

**Alec:** In the office, we had a few staff members organizing later flights for the students who wanted to say goodbye to Merritt. Our Arkansas hosts organized transportation in a 15-passenger church van. We had a grief counselor waiting at that hospital in Memphis.

**Tom:** The van pulled up in front of the hospital. It was downtown Memphis, a trauma center, sirens blaring, a chopper landing on the roof, bits of litter swirling on the ground, people and trucks and cars everywhere. I can't remember how many kids were with us --maybe three or so-- and Mike Bienkowski, the uninjured trip leader. Mike's a thoughtful, gentle guy, and he'd done a great job. He's tall and lanky, maybe 6'3" with a tangle of short blond hair. He'd cleaned up the best he could, but he was shot. We all were. As we neared the door, a woman approached us from the left, she was heading for the door, too. She was tiny-- maybe 5'3", a hundred pounds at most, blond. I didn't recognize her. But Mike did. He'd met her at the trip start when she'd dropped off Merritt. This was Anna Levitan. But I didn't know that. She walked by me, stepped in front of Mike, and pulled him down into a hug and kissed him and said, "**This is not your fault.**"

## Questions about the Narrative

**Emily:** At this time we're happy to take any questions you have specifically about the narrative.

and then, after a few minutes:

**Emily:** Thank you for those questions. Let's move on.

# Communications

**Emily:** We're going to present three slides that show the arc of our public communications.

**Jonathan:** The first is the message we put up on our website at 11:30 pm on July 2, 6 hours after the incident, the second came about 12 hours later on July 3, and the third was posted on July 4th.

**Tom:** You can clearly see the improvement. The first is a sterile press release, the second has some warmth--note the use of pronouns (**We** want to keep **you** updated...), and the third comes directly from Liz and me.

(Next Slide, give time for the audience to read)

## Initial Statement

Newport, Arkansas - On July 2, 2013 seven individuals on an Overland bicycle touring program were injured when a car traveling on route 17 struck the group. Police and paramedics responded to the scene. Three of the individuals were airlifted from the scene, including one individual who is in critical condition. The remaining four individuals were transported by ambulance and were being treated at local hospitals. Of these four individuals, two have been released. At this time, we at Overland would like to express our deepest concern for those injured and our gratitude to the emergency response teams.

**Jonathan:** When we posted this statement, we thought it was good. And it wasn't terrible. But it could have been clearer and, more importantly, it could have been much warmer and more human.

Bruce Palmer gave us the following feedback: "The statement on home page looks good, but it is a bit **confusing**

- Who is in the hospital and who is released?
- Have all **affected families been contacted**?
- When will you have **staff available to take incoming calls**?

The next morning, July 3, we posted an update at 11am. (Next Slide)



## 11am Update

We want to keep you updated on the incident that has affected one of our cross-country bicycle programs. Five individuals remain hospitalized, one in critical condition. The families of participants affected by this incident have been notified directly by our office. Overland's Founders and Directors, Tom and Liz Costley, as well as two additional Overland staff members are on the ground in the area with participants and their family members. We continue to express our deepest concern for those injured and for their families, and reiterate our gratitude to responding emergency personnel, including responding law enforcement personnel...

(Give time for audience to read.)

**Alec:** This is much better. It's clearer and more concise. There's better information, and it has a warmer and more personal tone (specifically using Tom and Liz's names).

**Jonathan:** On July 4th, after the group had said goodbye to Merritt and were on their way home, we were prepared to post the next update. One of the concepts we kept in mind was something I learned from Will Marling who was the Executive Director of the National Organization for Victim Assistance. He spoke with us on the phone and I later attended his seminar here at the WRMC. Will helped us understand the grieving process that students and families would experience and guided our plans and communications with the families in the months following the incident. One piece of advice I always keep in mind is that when communicating about an incident, always keep the victims at the center of your thoughts on how to proceed, what to say, and when to say it.

And that's just what we did on July 4th.

July 4, 2013

This morning we received confirmation that Merritt Levitan of Milton, Massachusetts, died as a result of injuries sustained in a terrible incident that occurred outside of McCrory, Arkansas, while participating in an Overland bicycle touring program. Liz and I, and the entire Overland community, are heartsick by this tragic loss. We extend our deepest condolences to Merritt's family, friends and loved ones.

Sincerely,

Tom & Liz Costley

## The Immediate Aftermath

**Tom:** On Thursday, July 4th, we left Memphis. We put the students on flights home, organized a plane for Rich and Anna, and dragged ourselves to the airport.

**Jonathan:** Over the course of that day, work continued in Williamstown. By this point, we had confidence in ourselves and in how we were handling things. We'd distilled our guiding principles into three words: OPEN, HONEST, DIRECT. We treated every phone call--with families or the media-- with care, and grounded what we said in these principals. With our leaders, too, we sought to be open, honest, and direct. We wanted to support them-- as people we cared about, and as trip leaders who we were counting on. Most of our leaders found support in their co-leaders and friends and many called the office to check in on ***how we were doing.***

**Alec:** The team in Williamstown spent a lot of time on the phone with leaders, supporting them, and guiding them as they struggled with how-- and, in many cases, if-- they should have a discussion about the incident with their groups. Many leaders, especially those with younger students, did not talk about it with their groups. Some leaders realized that students might hear about this in a letter from home or from a friend.

**Jonathan:** We organized a counselor to be on hand in Williamstown, and brought in folks from our community who wanted to help. They did simple things like making beds for the leaders, providing food, helping with routine tasks. We counseled leaders, especially those on the bike trips. There was also an outpouring of support

from families of Overland students and leaders, past and present.

**Alec:** We had another group biking the same route and they were scheduled to ride past the scene of the incident on July 5th. I worked with another staff member to vet and research a reroute for that group.

**Jonathan:** We continued to post updated information on how students who were in the hospital were doing, and we included a link to Merritt's obituary.

**Emily:** Throughout all of this, the team in Williamstown continued to oversee the trips for the 900 students who were in the field, and they prepared for the trips that would start on Sunday, July 7.

**Tom:** We made the decision to allow any family who wanted to withdraw from a trip to do so and receive a full refund. The team spoke to many families that weekend: you can imagine the quandary these families faced: they-- like us-- were scared. But as a parent what can you do? How do you balance the many, contradictory, and competing forces and feelings at a time like this?

**Alec:** I spoke to countless parents with students about to depart on trips. I always kept our guiding principles in mind: be open, honest, and direct; stick to the facts; and take pride in the team and the actions, policies, and procedures we have in place as an organization to manage risk.

**Jonathan:** In the end, only two students withdrew. That's it.

**Emily:** Sunday arrived. While most students fly to their trips, families in New England, New York, and New Jersey with students on trips that start in Williamstown drop off. On arrival in Williamstown, they sign in at a large welcome tent, and meet their leaders. I have always loved trip start --it's high energy and festive-- but this time, I was terrified. I thought I might start crying or that I might say something wrong. But I knew I had to go to trip start.

**Jonathan:** Our leaders were incredible. We spoke with them as a team and discussed how they might respond if parents or students brought up the incident. We had a counselor available all weekend, but leaders relied on each other and friends and family from home for support more than anything. Leaders had to be prepared to talk about the incident if it came up, but we assumed that in most groups it would not come up and that ended up being the case.

**Tom:** Obviously, this was a trip start like no other. A grandmother, tears in her eyes, hugged me. A mom did the same. Somehow, we all got through it.

## The Year Ahead

**Emily:** I spent a few weeks after the summer wrapped up on a bike trip, with other Overland people, friends. Being out there reminded me of how impactful bike touring can be - to be outside, under your own power, with friends, seeing new places. I returned to the office in September rejuvenated and reminded of why these trips are so important - why we do what we do at Overland. Looking back now on that year after the incident, I realize that we could have done more to support our year round team, both in the summer and in the months after. We were understandably so focused on the families and students. I think we could have done more to take care of our own team.

**Alec:** Every January we travel around the country and talk to parents and students about Overland. I knew we were going to be standing in rooms full of families, talking about the incident. I'd been used to answering the questions of "*are your trips safe?*" and "*has there ever been a fatality on your programs?*" a certain way. I dreaded the first presentation and those questions. That fall we spent a lot of time -- as we always do-- thinking and talking about the summer. So, when those questions came, we felt ready. While these questions were challenging, {I took a lot of confidence from the culture and practices we'd had in place for years}, how we had responded, and how we always worked as a team.

**Jonathan:** Everyone who was involved with Overland in the summer of 2013 shares a bond. Our office staff that summer worked more closely than I have ever experienced, and our leaders in the field rose to the challenge of staying focused on their students while all of this was going on. Parents of our students all knew the

story. Most people seemed to feel more connected to Overland and our staff as a result of how we handled the incident. Despite the media attention, there were still parents who had no idea this had happened and would ask over the phone or in person at an Overland gathering: “So what’s the worst injury you’ve ever had?” Responding to those questions called for the honesty and openness that we’d always relied on in communications, but also the ability to summarize a tremendously emotional situation.

**Tom:** For me, the year ahead was actually the **years** ahead, as it took two years to wrap up what happened in July of 2013. There was the long but essentially linear process of helping the affected families file insurance claims. Beyond that, I stayed in close contact with our Massachusetts attorney as two processes unfolded: (1) the legal process in Arkansas, and (2) the insurance claim against the driver of the car. The legal process changed course when Rich and Anna asked the prosecutor to arrange for the driver and his father to come to Boston to meet with them. In Trinity Church on Copley Square in the heart of Boston, Rich and Anna sat with the driver and his father. I don’t know what they discussed but I do know that at the end of the meeting they forgave him. The prosecutor then complied with Rich and Anna’s request that a judge not sentence the driver to jail time, but instead, that the driver do a year of community service, visiting schools in Arkansas to talk about distracted driving. The insurance claim against the driver was more complex and nerve-wracking. It ended with agreement by all of the attorneys that the payout from the driver’s relatively small policy should flow almost entirely to the Levitans.

More importantly, the years ahead for Liz and me would see the steady building of a deep bond with Rich and Anna. They had suffered so much more than us, but still, they knew we had suffered too.

## Takeaways for the WRMC

**Alec:** Make a plan. Do this before your season starts. And be prepared to change your plan as an incident unfolds.

**Jonathan:** Ask for help. And then filter the advice to sort out what will work for you.

**Emily:** Face challenges head on. As hard as this is, you can do it.

**Tom:** I have two takeaways— one looking outward, the other looking inward. Looking outward, be open, honest, and direct with everyone. Looking inward, you have to forgive yourself, and you have to be able to let others forgive you.

## Final Questions

**Alec:** We're happy to answer any questions you have.

[after 10-15 minutes]

**Alec:** Thank you for your questions, and for joining us today. We hope that what we've shared has been helpful. We'll wrap up now.



## What We Learned

**Emily:** I learned the incredible strength of each of my colleagues. And I also learned the importance of a team, and the importance of knowing your team members -- their strengths and weaknesses -- and having those pre-existing relationships with your team members. There's always been a culture at Overland of team-building within the office and through frequent office outings. For example, we would go see a movie, usually the latest installment of the Fast and the Furious movies-- which are, of course, ridiculous-- and then we'd all go to dinner. Part of me used to think these outings were a way to make things a bit more exciting in a tiny town like Williamstown. Work-sponsored fun. But, really, I see now, that it's so much more than that.

**Alec:** I learned that it's impossible to create perfect plans. So, in light of that -- and echoing Emily -- for me, it was about the team we had, and the culture that allowed our team to take those plans and respond as effectively as possible. The human aspect -- being honest, caring, and genuine -- was so important, not just as we looked outward from Overland, but as we looked inward, too.

**Jonathan:** I certainly learned how to ask for help. Bruce Palmer, Cathy Hansen Stamp, Michael Fineman, Will Marling, and many others, made it possible for me to weather this storm, but not just weather it. With their help, I was able to do the kind of work that, despite any missteps and mistakes, I knew was good.

I also found so much support from this community after the summer. I attended the WRMC for the first time in the fall of 2013 with Alec. Even people who had little

connection to Overland and who had not been involved that July showed concern and support in ways that made it possible for me to begin to process what had happened.

I learned, too, how powerfully connected the Overland community is. I remember on the day after the incident, there was a biker on the Pacific Coast who needed to leave the trip for non medical reasons. It wasn't urgent, but it was clear we needed to get her off the trip. In the midst of all the media interviews, I called up a past trip leader in Seattle, and asked him to drive 5 hours roundtrip to pick up this student, box her bike, and accompany her to the airport. Sure he said, no problem. I've got this. He did.

**Tom:** Before I wrap up, let me say again, how grateful Liz and I are, how grateful everyone at Overland is, for the support of this community. Everyone in this room loves the work they do-- to guide others outside, to show generation after generation how beautiful and exciting, how full of promise the world is. These are gifts we share with others, but we enjoy these gifts, too. We are fortunate to do the work we do.

Looking back now, six years later, I learned about gratitude. Gratitude for the support of my colleagues here today -- and gratitude for the support of other colleagues and friends from across the years and around the world. Finally, I also learned about grace. Rich and Anna's grace saved me in 2013. Their grace sustains today.

Thank you for joining us.