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## **SUPPORTING FAMILIES AND/OR VICTIMS IN THE AFTERMATH OF A CRITICAL FIELD INCIDENT**

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The telephone call rarely comes while you are at work, or seemingly at any moment in time when you are really ready. You hope you are going to get real information, and a lot of it, but you rarely do, at least at first. The caller may be a member of your staff, or on the staff of a land management agency, a search and rescue team or a sheriff's office. You hope the caller is not from the media.

However, the initial notification of a very serious "on program" incident comes in to the senior management of an organization, it is the beginning of a chain of events that will challenge all those working to manage the event as well as the organization itself. It is also most likely the beginning of a wrenching transition for a victim who may have suffered a traumatic and debilitating injury and thus the victim's family as well. If the victim of the incident has died, then the victim's family, program mates and the organization too will bear the burden of the most difficult possible loss. Regardless of its level of severity, the aftermath of this misfortune is also the beginning of a unique, intense, likely challenging, and ultimately (we hope) respectful and collaborative relationship between these people who are suffering a loss and members of your organization.

This article is based on a number of presentations we have made at Wilderness Risk Management Conferences where we have drawn on our experiences managing critical incidents which required intense interaction and involvement with either a member of our programs who was significantly injured on program and/or the family members of a program participant who was seriously injured or lost their life. We hope to highlight some of the major considerations in managing such situations, as well as recognizing where things can and do go in directions that we wished we had anticipated better. We also offer this advice with a great deal of humility, knowing that there are many right ways to approach these difficult situations.

Before proceeding however, it is important to consider why it is so important to do this work well. Why is it critical for organizational staff to manage this difficult relationship and communication versus assigning this task to our lawyers or other proxy? We certainly need to be

thinking about maintaining the integrity of our business. But equally important, it is absolutely the right thing to do on a human level. We all hope in life that people would treat other people as they themselves would want to be treated. This includes being treated with integrity, respect, candor and sensitivity. Some readers may be thinking that "well that sounds great, that's how I feel, but..." and then they think about the organization's insurance company, legal counsel or the board of directors, all entities focused fully on preventing any damage to the organization above all else. We believe quite adamantly that treating the victim and/or family the right way (the way we would want to be treated if we were in similar circumstances) is the best way to both protect the organization and to be true to the missions our organizations espouse.

Although this article started with a phone call coming from the field with bad news, this is not where the work begins. To assure that in the aftermath of a critical field incident, both the organization's mission and integrity will survive, and that you will have provided the most professional, humane and sensitive support possible to people touched by tragedy, have a plan already in place.

In developing the plan, consider the guiding principles that are at the foundation of your organization's culture and operational ethics. At NOLS and SCA, some of these key pieces of organizational philosophy at the heart of our response plans to critical incidents include:

- Treat others as you would want and expect to be treated in the same circumstances and in such a way that reflects the organizational values that you publicly present.
- Tell the truth and don't surmise if all the facts are not yet available.
- Define your organization's relationship to all participants and their families as a partnership well before any incident may occur in your organization's mar-

keting and enrollment process. After the incident changes the relationship, regardless of the difficulties that may occur, do not treat the situation as an “us vs. them” war or game.

- As important as your relationship with the victim and/or family will become, do not forget the organization’s equal obligation to staff and other participants, both the ones involved in the specific incident, and all others being served by the organization.
- Make sure that your organization’s plan for critical incident management and your implementation of the plan have pre-incident “buy-in” from all relevant constituents. This includes your insurance company, board of directors, both senior and field staff, and legal counsel. All will be partners in the management and resolution of the incident.
- We don’t have to do it “by ourselves”. Consider the use of outside professionals as necessary and appropriate, including search and rescue, land management agency professionals, counselors, clergy and outside incident reviewers.
- While it may not be appropriate in all situations, be prepared to share internal and external incident reviews with the victim and/or family. If it is determined not to share, they will undoubtedly know these documents exist, and you should be prepared to articulate why they are not being shared.
- Consider in advance the possibility that your organization may be at fault in the loss incurred on your program. What will be the status of the field staff involved? How will this change the strategy you will employ in managing your relationship with the victim and/or family?
- Consider the possibility of offering financial assistance to the family, particularly (but not limited to) funeral expenses. Your organization will likely be in far better financial shape to absorb the sudden and unplanned expenditure of potentially many thousands of dollars than many of the participants your organization serves. Providing such support does not indicate a legal assumption of guilt or responsibility.
- Regardless of where fault may ultimately lay, consider alternatives to law suits, including mediation or arbitration.

No set of guiding principles will provide a road map for every situation, but by setting the ethical foundation of your organization’s response to critical incidents you will have a far easier time improvising as you move forward.

The reality is that the options for moving forward are defined by your organization’s ethics and culture. But what you may wish to do, or what seems to be the best organizational solution for a particular issue brought up by the situation may collide with the perspective, wishes and needs of the victim and/or family and may also collide with other partners such as the organization’s insurance company. This overlap is in effect the area for all for both parties to maneuver within and as a result no particular direction or solutions should be assumed. What your pre-planning has done is to prepare you for living in the situation, which is quite different from being in charge of the direction things will take.

Once the guiding principles are set, actually building the plan is pretty straight forward, not very different from other action or emergency response plans your organization undoubtedly has produced for crisis management. Things to consider in the Planning and Implementation of a critical incident response include:

- Get your constituents and professional associates on the same page (in case they are not). Provide opportunities to get your legal counsel, insurance company account managers, members of your board and others into the field. Once they have confidence in the quality of your organization’s training, risk management practices, and the competency of your field staff they will be in a much better position understand the approach you wish to take when dealing with victims and/or families after a critical incident.
- Have a written plan, not just a concept. It should outline staff roles (including staff who should not be involved in the management of the incident to assure that the rest of the organization can still function), thresholds of internal and external communication and details for media management. How are difficult phone calls made? When is it better to travel to communicate tragic news in person? Who else should be present? Now that you have a plan, be prepared to deviate, innovate and if necessary, throw pieces of it out if it doesn’t meet the need of a situation that despite the best efforts and talents applied to its development was not anticipated.
- Designate a primary contact for the victim and/or family. Consider this person’s position in the organizational hierarchy, gender, age and any other element that would add to the comfort of the family and how the family will perceive the credibility and intentions of the organization. Sometimes this naturally seems to be the executive director and often works well that way. And sometimes for whatever reason the executive director is not the right personality (or some

other) match for the needs of the family (regardless of the role played, the ED should certainly be involved early and up front to clearly send the signal that the organization takes the situation very seriously and classifies it as the highest of organizational priorities). If the primary contact is not the executive director, proactively determine what kind of authority and decision making ability this person will be empowered with. Examples of in the moment decisions that need to be made may include committing organizational funds or human resources, or making a decision about what should or should not be confidential. Receiving requests from grieving family members that always have to be vetted with someone else rarely allows for a trusting bond to fully develop. Remember that with all the responsibilities this representative of your organization will have, one of the biggest is to earn (and deserve) the trust of these very people coping with a tremendous loss.

- Make sure someone else on staff is assigned to meet the needs of the primary family/victim contact as well as others managing the situation. Whether it is getting her coffee or making sure her dog is taken for a walk regularly or the house taken care of when she doesn't go home for long stretches, the primary is working very difficult hours under very intense pressure and is putting both the needs of the family members she is working with and the needs of the organization above her own. Checking in on their emotional well being is equally important.
- Training. Whether it is making a difficult phone call, talking to the media, debriefing the staff involved in the actual incident, we all need to go through scenarios and train repeatedly if we expect to perform to standard. This is not the type of situation to "wing it" based on confidence that everyone involved will rise to the occasion.
- Learn as much as you can about the victim and the family so you can better meet their needs. Do they have clergy or other trusted advisors that can be involved in both their support and communication with your organization? (In some cases a person in that role is who you might end up talking to rather than a family member).
- Be prepared for anger, frustration, hysteria and any other emotion you can imagine. Think about how you can sincerely respond and have someone available to you for debriefing after being on the receiving end of such strong and sometimes negative energy. It is easy to say "remember, don't take it personally" but if

you have not seriously considered how you would respond to an aggrieved parent yelling at you from three inches away that you killed her son, you are not yet ready for your role.

- As a senior management team, give careful consideration to key items such as whether you would recommend/facilitate a trip by the family to the incident site (is the incident on-going or closed?), bring the family in contact with the staff and members of the program/course the incident occurred on or who (in the case of a death) should go to the funeral – if invited. Also consider how you will respond to requests to see incident reports and other documentation or even a request to be part of the investigative process.
- Define your organization's documentation and communication protocols for both managing the incident, and then for the investigation and resolution of any and all issues attached to the incident. Key players may have different documentation responsibilities, and your organization's legal counsel may wish to define the "who, what and when" for this documentation, including whether (and how often) notes should be edited for clarity, relevance, accuracy and brevity. The rest of the organization no matter what its size, will be dramatically impacted by whatever the situation is, and it should be determined who should communicate with them and how often.
- Plan for the long haul. Regardless of the size of the organization, resolving some of the situations that arise from a critical incident can take time and however long it takes, will be an emotionally and physically wearing experience for those involved. And there are other programs/courses likely in the field and others prepping for the field, bills to pay, marketing and recruiting activities that need to continue, and all the other things that need to be done to keep a successful organization running.

One of the biggest challenges to utilizing this advice on how to prepare, regardless of the fact that it is all based on experience, is that every incident will bring unique features with it, and the people connected to each situation come from such extraordinarily diverse backgrounds, experiences and approaches to life. It can be very difficult to intuit how someone we do not either know or even know where they come from will act and we need to be very humble about even thinking we can imagine how they might feel.

Some circumstances that can charge an already difficult situation occur when the person seriously injured or deceased is a child, or if family members disagree with the victim's decision to participate in the activity or with the

organization. Parents may differ on how they feel about either the participation of their child (regardless of whether that child is a minor or adult) or the outcome of the incident, and this challenging situation can be significantly exacerbated if the parents are divorced, and then exacerbated further if remarried spouses are part of the scenario.

And there are many, many more possible scenarios that experienced program managers could either imagine or describe from experience. But we will stop here and end with the sentiment that we hope very few of our readers will actually need this advice. It is a difficult road to travel for all involved. If in fact you do need to travel this road, putting in considerable thought and planning into the possibility will help in more ways than you could imagine.

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## WRMC 2008 Conference Proceedings



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