

# TWENTY YEARS OF PRACTICAL SOLUTIONS FOR WILDERNESS RISK MANAGEMENT

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The story goes that famous mountaineer and outdoor educator Willie Unsoeld was once asked by a fearful parent if he could guarantee her son's safety on an Outward Bound course. No, he told her. But by sheltering her son from risk, he added, she would guarantee the death of his soul. Quality outdoor adventure and education programs have constantly sought the balance between facilitating activities emphasizing the essential value of risk in growing and nourishing the human spirit, and managing risk for the successful outcome of those activities.

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In 1989, after climbing Mt. Warren, a young National Outdoor Leadership School (NOLS) student named David Black was struck and killed by falling rock while descending. In the critical incident review of Black's death, it was learned that there was contradictory rock-fall management approach practices between Outward Bound and NOLS. In trying to understand what happened and why, Black's family challenged NOLS to create dialogue that they felt did not formally exist with and among other outdoor organizations and professionals.<sup>1</sup> The challenge elevated growing conversations between NOLS Executive Director Jim Ratz and NOLS Safety and Training Director Tod Schimelpfenig regarding the need to collaborate with other outdoor professionals.

After several years of informal exchange, NOLS convened the original Wilderness Risk Managers Committee in 1992. This original group was formed by representatives of NOLS, Outward Bound, Wilderness Medicine Society, Exum Mountain Guides, Association for Experiential Education, National Park Service, National Safety Network, American Alpine Club, and Outdoor Network. In his opening remarks, Schimelpfenig said:

“I would guess we all entered this field following the appeal of wilderness, the freedom it gave us, the responsibility and competence it demanded, and the impact our programs had on our students. Today, our programs come under greater public scrutiny and the public demands more from us: we feel pressure from our own sense of responsibility and drive to provide a better experience for our students.”<sup>2</sup>

Topics developed organically between the groups. By the end of a second meeting in 1993, the committee established a list of common concerns to address, including pressure to reduce adventure in the name of making programs completely safe, lack of consistency in gathering incident data, the growing influence of technology in reducing self-sufficiency in the field, release of liability forms, and varied rescue expectations from remote areas. Committee members had also reached a consensus on two key points: first, the Wilderness Risk Management Committee was to be a communication forum rather than a standard-setting body and second, a far more effective method of sharing information and learning from each other's experiences would be to convene an even broader group of professionals in the form of a conference.<sup>3</sup>

In September 1994, 190 individuals gathered under a large tent in Conway, Washington for the inaugural Wilderness Risk Management Conference (WRMC). Over the last 20 years, the WRMC has grown and matured into a unique international forum for organizations using wilderness settings for educational, adventure, personal growth, leadership development, and conservation service programs to openly discuss current risk management practices, issues, evolving ideas, and academic research. From the first year, the WRMC has been driven by people who are committed to the responsible management of risks associated with facilitated wilderness activities. NOLS, Outward Bound, and the Student Conservation Association (SCA) have co-sponsored and organized the WRMC each year since 1998, but the dialogue among hundreds of organizations on topics related to program administration, legal considerations, field staff training, program practices, and incident response has driven the evolution of risk management in the industry for the last two decades.

The potential for physical, intellectual, emotional, and spiritual growth through wilderness adventure and education draws participants to outdoor programs. But in embracing these activities it is important to acknowledge that risk is inherent in wilderness experiences, as it is in life. It is equally important to recognize the need for organizations to continually learn, to share, and to evaluate methods to best manage that risk. These needs inspired the founders of the WRMC and shaped the emergent community that now shares lessons from both success and loss.

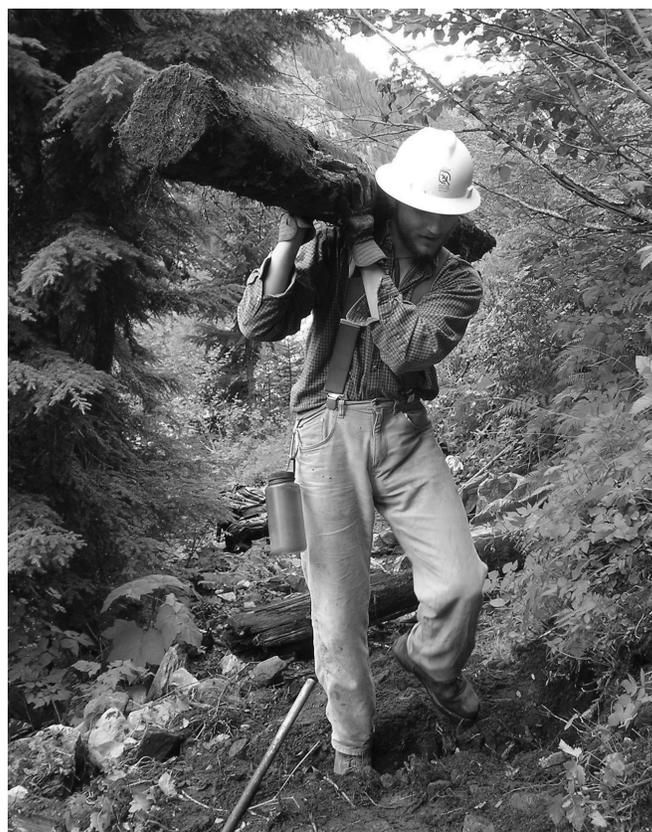


Photo courtesy of SCA.

Wilderness travel requires self-reliance because it is remote and isolated from modern technology. The title “Wilderness Risk Management Conference” is based on the foundational philosophy that it is impossible to create a completely safe

program. “Safe” is defined as free from harm. The phrase “risk management” reflects the goal to reduce the potential for fatalities and serious incidents, with the understanding that even well-run wilderness programs cannot guarantee the prevention of harm.<sup>4</sup>



Christopher Barnes

Risk management is best understood as an interactive set of systems. Wilderness programs contend with many variables, including the physical environment, stated program goals, and the people involved. Rather than overseeing a series of disparate issues, a successful program manager understands that—like in an ecosystem—a change in one set of practices will impact outcomes elsewhere in the organization. Each employee in an organization must understand the implications of their work and how it contributes to the organization’s culture of risk management. In order to share information and experience within the WRMC community, workshops are currently organized into key learning tracks that reinforce each other. Themes are legal considerations, staff training and decision-making, program practices, and emergency planning and crisis response.

### Legal Considerations

As one of the founders of the WRMC, attorney Charles (Reb) Gregg encouraged outdoor programs to take a proactive approach to legal issues. Gregg believed organizations should



Reb Gregg

concentrate on running high-quality programs with clear objectives while emphasizing appropriate practices for activities, equipment, and staff training. Rather than reacting to incidents, the goal was to preemptively reduce their likelihood by anticipating risks and employing effective risk management and communication strategies in anticipation of the inevitable incident and claim.

He highlighted the importance of proactively building an informed, candid relationship with the program’s legal and insurance representatives to identify responsibilities and reduce surprises when an incident occurs. Responsible program management also meant having legal agreements in place between the organization and the participants and/or parents that disclose risks in advance and create a relationship of trust and collaboration in good times and bad.<sup>5</sup>

For 20 years, legal workshops at the WRMC have provided attendees the opportunity to learn and apply this approach to legal aspects of risk management. Workshops have included “Almost Safe and Proud of It,” “Use of Participant Agreements,” “Choose Words Carefully: What You Say Matters,” and “Managing Legal Issues After a Serious Incident: What to Do, What to Say.” Over the years, a wide array of emerging issues were featured, including the impact of the Americans with Disabilities Act, the legal implications of the administration of medications, and understanding the process of a lawsuit.<sup>6</sup> Attorneys presenting at the WRMC have hosted mock trials designed to provide perspective for outdoor industry professionals. Embracing the legal approach highlighted at the WRMC has allowed program administrators to care and provide for their participants while also assuring the health of their organizations over the long term.

### Staff Training and Decision Making

Managing field staff in outdoor programs is unique in that managers often cannot directly observe a trip leader doing their job. Consequently, trip leaders and administrators need to work together, be clear on protocols, and communicate proactively. Initially, the staff-training workshops offered at the WRMC emphasized technical skill.<sup>7</sup> In the last 10 years, however, WRMC presenters considered the many factors that influence a trip leader’s decisions. Rather than solely communicating instructions through a manual, recent workshops have identified the connections among hiring practices, training, policies, feedback, and organizational culture as it relates to staff behavior and decision-making.<sup>8</sup>

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In addition to a trip leader understanding their role in the organizational system of risk management, he or she also needs to make effective decisions in dynamic environments. Tod Schimelpfenig describes the most powerful risk management tool as, “leaders making decisions in the field, from experience, with competence, and wise judgment.”<sup>9</sup> Not surprisingly, decision-making has been a WRMC topic throughout its history. As the community worked to improve decision-making skills, it has also sought out academic research on behavioral science and the decision-making process.

Topics explored have ranged from Gerald Wilde, Ph.D.’s risk homeostasis theory,<sup>10</sup> which he presented in 1997 at the WRMC, to recent discussion of Karl Weick’s theories of sense-making and high reliability organizations.<sup>11</sup> Other invigorating insights included Kent Clement, Ph.D.’s 2004 presentation of cognitive psychology, and how modern research

in brain function might explain how people of different ages make decisions in different ways.<sup>12</sup> Ian McCammon Ph.D., a 2005 keynote speaker, quantified factors that cause people to make risky decisions even when they know the risk factors that are present.<sup>13</sup> Through such presentations and the exchange that ensued, there has been an evolution in staff training and decision-making techniques in the outdoor industry.<sup>14</sup>

### Program Practices

No area of the conference better honors the memory of David Black than the commitment to compare and evaluate practices in programs where participants are exposed to similar risks. To this day, the WRMC community actively shares advances in knowledge about field practices. While doing so, the community strives to avoid the concept of a *best* practice, as it defies the realities of a dynamic wilderness environment, as well as distinct goals of different organizations and the populations they serve. Keeping to one of its founding principles, the WRMC does not play the role of standard-setting body. It instead remains a forum for assessing and sharing common field and administrative practices, ranging from lightning protocols to incident data collection.

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One of the earliest and, to this day most controversial, topics of conversation has been the role of communication technology in wilderness programs. As advancements in technology offered more practical communication devices—lighter radios, cell phones, satellite phones, and personal locator beacons—their use became more widespread. The wilderness education community questioned if technology would detract from the experience of being in the outdoors. The conversation triggered a heated debate in 1997. On the one hand, one presenter articulated



Photo courtesy of Outward Bound.

that technology “dilutes our exposure to the nature we seek, and it discredits our efforts to provide our clients with the real lessons nature provides.”<sup>15</sup> There was also concern that instructors’ ability to lead and assess situations would be inhibited by reliance on someone else’s knowledge through

communication devices.<sup>16</sup> On the other hand, it was argued, “a wise leader uses all available and pertinent information for a decision, whether written in a book, found in discussion with colleagues, or obtained in a phone call.”<sup>17</sup> The WRMC did not advocate one position over another but did provide a forum to discuss the topic. Portable communication technology has certainly become more accepted and expected by the majority of participants seeking out wilderness programs. One of many discussions on practices over the years, communication technology continues to be a vibrant example of provocative issues that arise as practices evolve.

Another theme of program practices brought to the WRMC addresses the needs of specific populations. Organizations like the SCA and the Santa Fe Mountain Center have identified and presented on the importance of cultural



Photo courtesy of WMI.

competency from a risk management standpoint, concluding that, “a person’s cultural affiliation often determines their values and attitudes about the outdoors, how they receive responses to messages from leaders, and even how they perceive the notion of ‘safety’ in unfamiliar environments.”<sup>18</sup> Conference attendees have dedicated similar attention to risk management questions regarding populations such as adolescents, adjudicated youth, differently-abled people, wilderness therapy participants, and participants exhibiting behavioral or mental health challenges.

From its inception, leaders of the WRMC were proponents of systematic reporting and collection of data on incidents that occurred on wilderness programs. Some efforts pre-dated the formation of the WRMC, and the founders wanted to expand and professionalize the effort. The WRMC teamed with the Association for Experiential Education to design the Adventure Program Incident Data Reporting Project. The goal was to collect in-depth incident data to understand the types of incidents that occur, more accurately describe the risks participants face, and to help reduce incidents. Participation was voluntary for organizations, and conference organizers provided tools and analysis. The project stood out as an opportunity for programs to share information and techniques to advance greater knowledge. Three reports were published and today, more programs collect incident data than ever before.

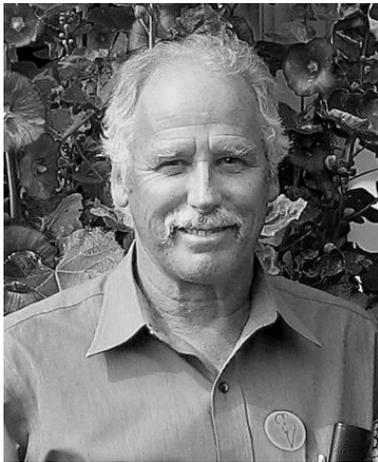
### Emergency Planning and Crisis Response

In an industry where serious incidents are infrequent, lessons from peers served to strengthen the response plans of many

programs over the history of the WRMC. In addition, the community has fostered a rich exchange of support after tragic and challenging circumstances.

*“ Over the years we’ve worked hard at systems and training and resources to help us manage risk in our wilderness ventures... Yet our locus of control remains narrow. We rely on the leader at the sharp end of the rope, with their hand on the tiller, with the participant and the situation in front of them. ”*

Industry leaders including SCA Vice President Jay Satz and NOLS Director of Risk Management Drew Leemon have advised organizations to write comprehensive plans that help to manage various needs in a crisis. Emergency response plans include procedures for field response, internal communication, media communication, investigation, and methods for compassionately working with survivors, family members, and staff. The goal of establishing these plans is to anticipate as many factors as reasonably possible with the understanding that, by definition, a crisis will include unpredictable elements. One significant conversation has been how freely organizations should discuss the circumstances of an incident, particularly to family members and media. The WRMC founders have long contended that a cooperative and open approach with families (and attorneys) can produce a more positive resolution of a dispute, even if a lawsuit is filed.<sup>19</sup>



Jed Williamson

The stories that individuals have shared, though sometimes difficult to tell, have offered context for organizations as they write their plans. Deb Ajango had just become the Director for Programming for the University of Alaska Anchorage (UAA) in 1997, when the program experienced multiple student fatalities on

a mountaineering trip. Relying on advice from attorneys and its insurance company, UAA suppressed information about the incident. After receiving support and guidance as an attendee at the WRMC, Ajango later shared her story to open dialog on how to better handle such situations.<sup>20</sup> In addition, she taught about the impacts of such trauma on families, staff and community, adding to a collective examination over 20 years on how to understand and support human responses to traumatic situations.

In 2006, Reb Gregg and Kirk Shimeall, then Program Director at Catherine Freer Wilderness Therapy, described the legal proceedings that ensued after a young woman died of hyperthermia during a field program. Despite a comprehensive risk management plan, developed from Shimeall’s WRMC experiences, Freer’s insurance company drove the process differently than that called for by the organization’s plan. Shimeall described the organization as being swept up into a long legal battle with a heavy emotional toll for which they were not prepared.<sup>21</sup> Gregg taught the value of preparing for the “reality of an organization trying to navigate with trust and integrity, but instead colliding with commercial interests and the court system.”<sup>22</sup> For organizations and for individual survivors, despite excellent preparation, support structures, and a rigorous investigation, a serious incident bring with it uncertainty, loss, sometimes isolation, and certainly learning. The WRMC founders’ intent was to advance risk management practices, including incident response. Each incident reemphasizes to the community the importance of this core purpose.

### Conclusion

On the occasion of the 16th Annual WRMC in 2009, the conference steering committee and co-sponsors inaugurated the Charles (Reb) Gregg Wilderness Risk Management Award to recognize exceptional leadership, service, and innovation in the practice of wilderness risk management. The award honors Gregg’s extraordinary legacy of service to the outdoor community, and organizations that utilize wild places. It also set the stage for the WRMC community to recognize the value of dedicated professionals who are generous in sharing their experience and expertise with the community. Jed Williamson was the first to be recognized with the Charles (Reb) Gregg award for his leadership in pushing for excellence in field practices, his commitment as editor of *Accidents in North American Mountaineering* since 1974, his outstanding contribution to the art and science of accident investigation, and his unfettered willingness to offer support to those who requested it.

*“ We have adapted. We have become more professional. We have pushed the envelope for each other - one organization addressing one issue, field communication or background checks, for instance, and raising the bar, and another organization doing the same with another issue. And in this, we’ve bootstrapped our way along, getting better at taking people into the out-of-doors and bringing them back unscathed, yet happily altered. ”*

In accepting the second annual award in 2010, Tod Schimelpfenig spoke of balancing the concepts of building strong systems with keeping decision making close to the field, saying, “Over the years we’ve worked hard at systems and training and resources to help us manage risk in our wilderness ventures...



Photo courtesy of Brad Christensen.

Yet our locus of control remains narrow. We rely on the leader at the sharp end of the rope, with their hand on the tiller, with the participant and the situation in front of them”.<sup>23</sup>

In accepting the award the following year, Lewis Glenn spoke of how programs improve faster by pushing and aiding each other saying, “We have adapted. We have become more professional. We have pushed the envelope for each other - one

organization addressing one issue, field communication or background checks, for instance, and raising the bar, and another organization doing the same with another issue. And in this, we’ve bootstrapped our way along, getting better at taking people into the out-of-doors and bringing them back unscathed, yet happily altered.”<sup>24</sup>

As the WRMC celebrates its twentieth year in Grand Teton National Park in 2013, over 400 dedicated risk management professionals from over 200 organizations will gather to carry on a conversation essential to the organizational missions and health of the outdoor community. These participant’s voices, passions, and experiences join more than 5300 attendees over 19 years, creating a ripple of influence that extends to peer organizations, their participants, families, staff, lands managers, and the public at large.

Attendees continue to reflect on challenges that face the larger community. Some issues that remain most pressing today, such as expectations for technology use and rapid rescue, were amongst those identified in the Wilderness Risk Managers Committee’s original conversations.

But other issues are more current or just over the horizon. The development of the 24-hour news cycle and pervasive social media have changed the way critical incidents are reported to and experienced by the public. How does this impact our ability to carry out rescues or investigate incidents effectively? How can we develop effective programs to engage returning veterans? How do we sustain access to wilderness itself, as federal and state land management agencies struggle with budget cuts and changes in priorities? How do we assure the very survival of wilderness and wild places in an increasingly urbanized society dealing with population growth and climate change?

While daunting at first, there is great hope that we will meet such challenges. We will meet these challenges by connecting more people to the transformative power of challenging themselves in, playing in, and conserving wild places. If we meet these challenges, it will be in large part be due to the combined intellect, experience, and passion of a community committed to a higher purpose.

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Final editing by Liz Tuohy, WRMC Steering Committee Chair

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<sup>1</sup> Tod Schimelpfenig (WMI Curriculum Director), interview by Max McQuarrie, June 19, 2013; “Account of the Death of David Black Student on WMT 7/3/1989,” NOLS Newsletter, August 1989; Tod Schimelpfenig, “The Wilderness Risk Management Conference- A History,” Wilderness Risk Management Conference Proceedings, no. 9 (2003): 4.

<sup>2</sup> Tod Schimelpfenig, “WRMC Minutes 1992,” Wilderness Risk Management Committee.

<sup>3</sup> Schimelpfenig, “WRMC- A History,” 4.

<sup>4</sup> Reb Gregg (Attorney), Interviewed by Shana Tarter, October 25, 2012; Jed Williamson (Chair of Safety Advisory Council for the American Alpine Club) Interviewed by Max McQuarrie, July 23, 2013. Preston Cline, “Re-examining the Risk Paradox,” Wilderness Risk Management Conference, no. 10 (2003): 23.

<sup>5</sup> Reb Gregg (Attorney) interviewed by Max McQuarrie. June 26, 2013.

<sup>6</sup> Gregg, Interview with Max McQuarrie, June 26, 2013; Reb Gregg, “Almost Safe and Proud of it” Wilderness Risk Management Conference Proceedings, no. 4 (1997): 23; Catherine Hansen-Stamp, “Developing Releases and Related Documents,” Wilderness Risk Management Conference Proceedings, no. 4 (1997): 28-34; Catherine Hansen-Stamp and Reb Gregg, “Up or Down: High Tech? No Tech?” Wilderness Risk Management Conference Proceedings, no. 9 (2003): 120; Catherine Hansen-Stamp, “Risk Management Issues in the Digital Age” (PowerPoint, Wilderness Risk Management Conference, 2009), <http://www.nols.edu/wrmc/resources.shtml>.

<sup>7</sup> Wilderness Risk Mangers’ Committee, Wilderness Risk Management Conference Proceedings (Lander: NOLS, 1994): 1-169.

<sup>8</sup> Liz Tuohy, “Training Your Staff to be Risk Managers,” (PowerPoint and the Wilderness Risk Management Conference, 2009.) <http://www.nols.edu/wrmc/resources.shtml>.

<sup>9</sup> Tod Schimelpfenig (Acceptance speech for the Charles “Reb” Gregg Award.) October, 2010, [http://www.nols.edu/wrmc/reb\\_gregg\\_award.shtml](http://www.nols.edu/wrmc/reb_gregg_award.shtml)

<sup>10</sup> Gerald J.S. Wilde, “Risk Homeostasis: An Overview,” Wilderness Risk Management Conference, no. 4 (1997)

<sup>11</sup> Karl E. Weick and Kathleen Sutcliffe, Managing the Unexpected: Resilient Performance in an Age of Uncertainty (San Francisco, CA: John Wiley & Sons, Inc., 2007), 1-160.

<sup>12</sup> Kent Clement, “The Psychology and Sociology of Judgment for Outdoor Leaders,” Wilderness Risk Management Conference Proceedings, no. 6 (1999): 16-20; Kent Clement, “New Studies in Judgment with Regard to Brain Research,” Wilderness Risk Management Conference Proceedings, no. 12 (2005): 37-41.

<sup>13</sup> Kerry Brophy, “NOLS Snow Scientist,” The Leader, Fall 2003, accessed September 11, 2013, [http://www.nols.edu/alumni/leader/03fall/ian\\_mccammon.shtml](http://www.nols.edu/alumni/leader/03fall/ian_mccammon.shtml)

<sup>14</sup> Tuohy, “Training Your Staff to be Risk Managers,” (PowerPoint, WRMC, 2009.) <http://www.nols.edu/wrmc/resources.shtml>.

<sup>15</sup> Dave Wescott, “Bring Back Natural Reality,” Wilderness Risk Management Conference Proceedings, no. 4 (1997): 99.

<sup>16</sup> Drew Leemon (Director of Risk Management at NOLS), Interviewed by Max McQuarrie, June 18, 2013.

<sup>17</sup> Tod Schimelpfenig, “Cell Phones and Radios on NOLS Courses,” Wilderness Risk Management Conference Proceedings, no. 4 (1997): 102.

<sup>18</sup> Sky Gray and Nina S. Roberts, “Culture, Competency and Risk: The Mystery and Crossroads Continues,” Wilderness Risk Management Conference, no. 11 (2004): 28; Kevin Moeller, interviewed by Max McQuarrie, June 25, 2013

<sup>19</sup> Catherine Hansen-Stamp and Reb Gregg, “Post Accident Conduct— Hunker Down or Cooperate?” Outdoor Education & Recreation Law Quarterly no. 2, vol.3 (Fall 2002): 1-6.

<sup>20</sup> Deb Ajango, “The Ultimate Goal in Crisis Response,” Wilderness Risk Management Conference Proceedings, no. 9 (2002):57-61; Shana Tarter (Assistant Director of the Wilderness Medicine Institute), Interviewed by Matthew McQuarrie, June 28, 2013.

<sup>21</sup> Kirk Shimeall and Reb Gregg, “After the Fall: Surviving a Fatality and a Lawsuit,” (Workshop at the Wilderness Risk Management Conference, Killington, VT, 2006); Shana Tarter, Interviewed by Max McQuarrie, July 8, 2013.

<sup>22</sup> Reb Gregg, Email to Liz Tuohy, September 11, 2013.

<sup>23</sup> Tod Schimelpfenig, “Words by Tod Schimelpfenig on Receiving the Charles (Reb) Gregg Award,” (Speech, Wilderness Risk Management Conference, Colorado Springs, CO, 2010). [http://www.nols.edu/wrmc/reb\\_gregg\\_award.shtml](http://www.nols.edu/wrmc/reb_gregg_award.shtml)

<sup>24</sup> Lewis Glenn, “The Reb Gregg Award Remarks” (Speech, Wilderness Risk Management Conference, Boston, MA, 2011). [http://www.nols.edu/wrmc/reb\\_gregg\\_award.shtml](http://www.nols.edu/wrmc/reb_gregg_award.shtml)