

## WRMC Action Steps 2016

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

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

Each presenter has contributed three action steps from their 2016 WRMC workshop. In some cases the action steps parallel the main take home points of the workshop; in other cases the action steps are examples of a multitude of possible follow-up action.

**The following action steps are arranged alphabetically and include pre-conference workshops and posters.**

### **And the Winner Is...(?) Hot issues, Hot Cases**

*Cathy Hansen-Stamp*

1. Review your organization's risk management plan and/or policies to identify or clarify 3 issues discussed in this presentation.
2. Identify 3 issues raised in this presentation that affect your operation and incorporate case discussion and outcome into your organization's staff training.
3. Work with legal counsel to review case law in your jurisdiction addressing 3 questions/concerns, relevant to your organization, which you identified in this presentation. As a next step, consider having legal counsel provide you with a brief review of case law and laws that specifically impact the different aspects of your operation and your documents, prioritizing discreet areas.

### **Administration of Epinephrine in the Backcountry: Evolving Legal Considerations**

*Nadia Kimmel, Leah Corrigan*

1. Contact legal counsel to discuss the status of the law on epinephrine administration in the states in which you operate, and discuss whether your organization is in a legal position to implement such a program, and what the potential insurance ramifications could be.
2. Plan a meeting with wilderness medical professionals, legal counsel, and your physician advisor to determine how to implement an epinephrine administration protocol within your organization.
3. Plan an anaphylaxis training module (stand alone or within a wilderness medicine course) for your staff that meets state and or local protocols.

## **Advanced Foot Entrapment Techniques**

*Nate Ostis*

1. Plan a training module for preseason focusing on foot entrapment.
2. Review and update swiftwater rescue gear and verify preparedness for foot entrapment in the field.
3. Create a field practice document for managing foot entrapment and implement it's use on upcoming courses.

## **Big Decisions in the Field (and Their Legal Implications)**

*Leslie Arutunian, Reb Gregg*

1. Review your organization's policies for consistent field-based decision making.
2. Train for awareness and understanding of legal implications.
3. Align policies and practices with insurance coverage.

## **Blindspot: Near Miss Trauma**

*Brendan Madden*

1. 1. Develop a psychological support plan at your organization to be used in the event of near miss trauma (e.g.: identify local psychologist who can provide therapy).
2. Train your program supervisors to monitor for signs of psychological trauma in your field staff.
3. Develop and implement a focused plan to build an intentional culture of openly discussing near misses and symptoms of trauma in your organization.

## **Building Intuition for Low Frequency High Consequence Events**

*Clinton Culp*

1. You will be able to identify low frequency, high consequence, non-discretionary time-to-task events and conduct a pre-mortem that will help your staff reduce risk.
2. You will be able to design and conduct a realistic decision-making exercises that will help you and your staff gain simulated experiences of low frequency high consequence events.
3. You and your staff will be able to conduct a critical after review of an incident, or near miss, designed to give detailed feedback and improve the decision-making process and quality of low frequency, high consequence, non-discretionary time-to-task events.

## **Checklist Manifesto for Outdoor Programs**

*Al Wright*

1. Outdoor staff and managers will evaluate current-use checklist for effectiveness.
2. Staff and managers will adopt improved checklists for their adventure activities.
3. Managers will adopt practices for training staff in use of the checklist system.

## **Climbing Gear Testing: Facts, Myths, and Breakin' Stuff**

*Garth Tino, Russell Slaugh*

1. Discuss the limits of climbing gear.
2. Learn how to properly use specific equipment to mitigate risk in certain scenarios.
3. Learn how to break equipment.

## **Communicating Through Crisis: A Holistic Approach**

*Skip King, Will Marling*

1. Gain understanding of the impact of physical and/or emotional trauma experienced by victims, responders, and organizations – how it's caused, and how it radiates through entire communities.
2. Gain understanding of what the public wants to know, and how both conventional and social media work to answer those questions.
3. Learn to align communications efforts so that essential messaging remains consistent and accurate, while being sensitive to the needs of both victims and organizations dealing with a crisis.

## **Complexities in Intercultural Emergency Response**

*Tim Hare*

1. List the resources that you currently have in place to support your international programs.
2. Identify blindspots (trainings, medical resources, cultural understanding) and develop a strategy for addressing them.
3. Find one person at this conference from a different culture and talk to them about differing perceptions of risk between your two cultures.

## **Crisis Communication in the Digital Age: The Basics Still Matter**

*Bruce Palmer*

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

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

*Drew Leemon*

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

## **Decision-Making: Errors of Perception**

*Gates Richards*

1. Address decision-making strategies within your team as a concept worthy of attention, but do so without focusing on a specific decision.
2. Conduct some of these activities within your team to illustrate that we all have misperceptions – this is a fact, not a judgment.
3. Create a decision-making system within your team to minimize the chances of only one perspective being used in the DM process.

## **Effective Outdoor Program Design and Management**

*Paul Nicolazzo, Joel Reid*

1. To reduce incidents within an outdoor program, train your instructors to the point of failure for an accurate self- and organizational-assessment.
2. To increase instructor judgment, train your instructors in site management theory followed by field demonstrations and practice using established activity progressions sites.
3. In order to design and manage a outdoor program effectively, interview and hire administrative candidates who are aligned with the organization's mission, vision, and general delivery strategies,

and have spent numerous years in the field as instructors and staff trainers in the activities they will be managing before being trained and mentored as an administrator.

### **Exploring the Exculpatories**

*Reb Gregg*

1. Explain your legal duty of care, generally and as shaped by your documents and practices, in separate or joint sessions of your staff and Board.
2. Review your contracts, web site and public representations to learn if changes are required to align your duty of care, as presented, with your mission and culture.
3. Be sure that your clients and client families are informed of and acknowledge the duty of care which you assume including, importantly, any reduction of what they might have otherwise have expected in that regard.

### **From the Gecko to the Stag: How to Prioritize and Optimize Your Organization's Insurance Program**

*Don Pachner*

1. Assess your organization's current insurance markets.
2. Assess your organization's current insurance coverage and costs.
3. Weigh the importance of the source, coverage, limits and cost to determine optimal insurance program for your organization.

### **Have You Got It Covered? Exposures That Could Lead to an Organizational and Financial Meltdown**

*Steve Neal, Sam Daume*

1. Plan a meeting with your insurance broker, legal counsel and other professionals to review your organization's insurance program coverages with a goal of understanding what is and what isn't actually covered.
2. Build a staff-training module to ensure awareness of relevant coverage and specific steps to mitigate exposures.
3. Develop an annual process to ensure all members of your organization understand the importance of timely and accurate reporting of insurable incidents.

### **High Impact Training Practices: Tools for Socializing Your Training and Leveraging Relationships in Learning**

*Michah Leinbach*

1. Identify a list of the training sessions you use but aren't proud of yet – apply the KISS 'EM approach to these to bring out potential new facets.
2. Identify any training sessions you utilize that routinely run over an hour – determine if they can be modulated.
3. Identify your specific "control points" to ensure your training does the necessary assessment, then liberate the rest of your training using social tools.

### **I Can't Believe They're Doing That! Lessons from the Intersections of Guiding and Outdoor Adventure Education**

*Joshua Cole, Erika Halm*

1. Participants will identify at least one practice or standard from the guiding industry and one practice or standard from the outdoor and adventure education industry to integrate into their own organization. Participants will create a brief written plan to do so with potential roadblocks identified.

2. Participants will critically examine their own organization's activity risk and student ratio and determine whether these are intentionally driven as part of the organization's risk management or due to external factors (e.g. economics). Participants will identify where mission, risk tolerance, staff ratios and field practices are not aligned.
3. Participants will identify specific instances where cross-pollination between the guiding industry and the outdoor and adventure education industry would benefit risk management for the entire outdoor industry.

### **Incident Tracking Database: Improving Safety Through Advanced Data Analytics**

*Rick Curtis*

1. All programs should implement some form of ongoing data collection for both incidents and close calls by using an industry standard set of data fields.
2. Data should be analyzed on a regular basis comparing incident rates and severity levels against historical data from the program.
3. "Deep Dive" into your data by using advanced Business Intelligence (BI) tools to uncover trends and take action steps to respond to those trends.

### **Inclusion Practicum**

*Sydney Clark, Anne Peick, Emily Ledingham*

1. Facilitate three exercises with your staff.
2. Encourage staff to use the activities to support diversity with program participants.
3. Every week, practice one act of allyship, and encourage your staff to do the same. (See WRMC online resource center for activities and information on allyship.)

### **Lawsuits, Legal Issues and Lessons for the Outdoor Industry**

*Wilma Gray, Jill Penwarden*

1. Learn issues central to lawsuits filed against wilderness recreation programs.
2. Program leaders/owners can use the information for the preparation of their plans and documents.
3. Take away lessons specific to wilderness recreation programs.

### **Making Good Programming Decisions in the Face of Media Hype**

*Chad Olcott*

1. Organize effective program decision-making with your operations team and plan to revisit those decisions in the event of a local or international crisis.
2. Work with your marketing team to examine marketing materials to ensure you're not over-promising.
3. After consultation with legal counsel, examine your terms-and-conditions to ensure you're leaving yourself enough flexibility to cancel/modify your program, as needed.

### **Media Masters: Crisis Training for the Spotlight**

*Travis Taylor, Karmina Zafiro*

1. Develop and adhere to a crisis communications plan.
2. Conduct training and simulation drills to prepare for crisis scenarios.
3. Assess the situation, confirm facts, develop key messages, and practice before interviews to safeguard your organization's reputation.

### **Medical Screening: Options and Answers**

*Frances Mock, Seth Hawkins*

1. Discuss the pros and cons of different approaches to medical screening with your medical advisor and staff to decide which is best for your organization.
2. Formulate or revise your medical questionnaire to clearly reflect whether you are doing medical screening or merely collecting information for use in an emergency.
3. Only include questions on your medical screening form that are not excessively intrusive and that are confined to relevant medical conditions.

### **More Than People, Equipment, and Environment: The Design of a Risk Assessment Method**

*Clare Dallat*

1. With members of your organization's team, sit down and identify the network of 'actors' involved at all levels of your organization (e.g. parents, field staff, program managers, legal, regulators, school board, environmental conditions, equipment, external/sub contractors). Using the framework provided (Salmon et al, 2012), map actors to 'levels'.
2. Using the provided Led Outdoor Activity System Hierarchical Task Analysis and NO-HARMS, (Dallat et al, in preparation), discuss and identify which hazards and risks may relate to your program during the design, planning, and preparation stages.
3. Using the NO-HARMS system, discuss and identify risk control measures with your team that enable management of these risks at the level in which they appear (e.g. allergy management systems involving parents, camp catering management, and appropriate medication supplies brought on program).

### **Navigating Health, Safety, and Security Abroad**

*Bill Frederick*

1. Tailor your incident/emergency response protocols precisely to what your programs do, where they operate and the population with which you work.
2. Identify specific opportunities to improve incident prevention strategies.
3. Identify 3 areas of expertise that either need to be enhanced internally or accessed externally.

### **NOLS Administrative Risk Management Training**

*Kate Koons, Brendan Madden*

1. Take two exercises from the training and use them in an administrative staff training in the next six months.
2. Ask your insurance carrier if they have tools that you can use for driving training.
3. Clarify emergency response roles and procedures, in writing, with your contractors.

### **Parent Phone Practice Call Lab**

*Jamie O'Donnell*

1. Identify two characteristics or behaviors of potential parents (or clients) that are likely to hook you into angry or defensive communication. Write down one strategy for responding constructively to each of those behaviors.
2. Identify five pieces of information you want to have written down before making your next parent phone call about a behavioral incident. Then do the same for a medical incident. Incorporate those lists into your next staff training.
3. Identify two people in your program or a similar program who can serve as resources for you in preparing for or debriefing a challenging parent phone call. Contact those people in the next six months about serving as resources for you in the future.

### **Performing Under Pressure**

*Deb Ajango*

1. Create a realistic and intense/stressful emergency-based scenario (field or administrative) that can be used to improve instructor performance under stress.
2. Develop organizational guidelines or create a form that can be used to help people give and receive effective feedback.
3. Create a useable and effective checklist that is single-task oriented and that can help guide employees through a field emergency.

### **Preparing Administrative Staff to Manage Programs in the Field: A Team Approach**

*Kate Farthing, Lindsay Venable*

1. Analyze the current process for preparing staff at your headquarters to manage programs in the field. Include processes for each role/department (marketing, customer service, field operations, third party consultants).
2. Identify new processes you would like to implement for your organization as a whole and for specific roles/departments. What are challenges you might face?
3. Create a timeline highlighting a plan for implementation.

### **Rejecting the Binary: Managing Risk for the Queer and Trans Communities**

*Kira McGieson, Elyse Rylander*

1. Participants will be able to articulate why queer inclusion matters in the context of the outdoor industry.
2. Understand the gaps in our current training for trans individuals and how to fill those gaps.
3. Participants will be given tools to engage in allyship of the queer community.

### **Risk Management and Crisis Response: A Case Study**

*Cathy Hansen-Stamp, Doug Stevens*

1. Work with legal counsel to develop a) a participant agreement (containing acknowledgment and assumption of risks, release, indemnity, choice of law and venue, and other important provisions) consistent with your operation and applicable law and b) a contract 'template' or templates for use with subcontracting arrangements that among other content, identifies the scope of the contracted activity, the respective responsibilities and liabilities of the parties, the role of company staff (and any coordination with contracted staff) on a contracted activity. Familiarize attending staff with the relevant substance of these agreements.
2. Review your existing (or develop) guidelines for vetting of (new and existing) subcontractors (including 'retro-vetting'). Include a plan to annually or periodically communicate with existing subcontractors to determine whether there has been a change in ownership or leadership or other factors that may necessitate further vetting.
3. Coordinate with subcontractors' leadership regarding the role of attending subcontractor staff and coordination with attending company staff (including the issues of supervision and emergency response). Train your staff on these issues, including any 'cultural' issues at play and importantly, staff members' ability to halt the activity (versus taking it over).

### **Risk Management Primer**

*Tracey Knutson*

1. Participants should be able to think through their own risk management style and goals and what they need to create a rubric for a risk management program for their business, operation or program.

2. Participants should walk out knowing, based on some evidence and case structure knowledge, what they would need to collect and assess and who they would need to contact in the aftermath of a critical incident so that they can defend themselves in the event of a critical incident.
3. Participants should be able to understand some of the varying and different standards that will apply to their activity or operation and be able to intelligently and concisely respond to and manage media inquiries in a way that safeguards their operation or program.

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

*Will Marling*

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

### **Root Cause Analysis: A Technique for Incident Investigation**

*Mark Vermeal, Mike Pigg*

1. Identify areas of organizational resistance to root cause analysis.
2. Revise incident reporting paperwork to incorporate appropriate root cause analysis techniques and outcomes.
3. Develop an incident analysis training course for program administration staff.

### **Safety Culture: Management Levers that Drive Safety Performance**

*Jeff Jackson*

1. Survey your staff for their impressions of your safety culture.
2. From the variables provided, target areas of strength and areas to improve.
3. Foster social identity, peer influence, and safety values through training initiatives.

### **Search and Rescue Victims: Who Are They and What We Can Do to Reduce the Risk**

*Daniel Hadley*

1. Identify risky behaviors in your group.
2. Create preventative plan to address risky behavior.
3. Adapt rescue plan based on group experience during wilderness outing.

### **Small Organization Emergency Response Plans: Where Do I Start?**

*John Kelley*

1. Identify 3-5 professional resources that can assist your organization in the area of risk management.
2. Identify the key individuals within your organization who can assist in building your organization's risk management plan.
3. Identify regional and local (EMS, SAR, law enforcement) and work to build collaboration in the event of a crisis.

### **Staffing and Compensation Issues**

*James Pearson*

1. Learn about recent changes to wage and hour laws and how employees should be compensated based upon hours worked and classification.
2. Learn what questions may or may not be asked during an employment interview.

3. Reduce the risk of employment related lawsuits or government action against an organization.

### **State of the Field: Using Comparative Risk Management Data to Benchmark Your Program**

*Jim Sibthorp, Lisa Meerts-Brandsma, Shannon Rochelle, Drew Leemon*

1. Compare how your organization manages risk with the overall industry as well as organizations of similar size and with similar goals.
2. Identify at least 2 additional strategies that you can use to improve your own program's risk management plan.
3. Learn what industry respondents report as the biggest hazards they anticipate dealing with in 2016 and the strategies they will use to manage risk associated with these hazards.

### **Supporting Students in Programs Designed to Diversify Conservation**

*Rob Terry, Millie Jimenez, Megan Kohli*

1. Inventory previously unrecognized social and emotional risks, both on program and at home, that impact participants, particularly those from underrepresented backgrounds.
2. Create a list of structural changes that can be made to your program to reduce feelings of social/cultural alienation for participants.
3. Create a list of new program interventions that directly support participants as they extend themselves into environments where they have little cultural or peer support.

### **Supporting Struggling Participants: Managing Behavioral and Mental Health Issues**

*Katie Baum Mettenbrink, Emily Ledingham*

1. Define 2 zero-tolerance and 5 case-by-case participant behaviors for your program. Check alignment between administrators and field staff at next opportunity by soliciting examples of each and discussing.
2. Query field staff about challenging behavior or mental health incidents they have faced. Choose 2-3 as case studies for next staff training or briefing. Talk through the case studies and identify what management strategies might be appropriate and how staff could determine whether the situation is field manageable.
3. Make a list of 5 questions you'd like field staff to consider in assessing a challenging behavioral or mental health issue. Aim for questions that will help your staff decide whether the participant should continue on your program.

### **The Developing Adolescent Brain with Respect to Education and Safety Management**

*Steve Creech*

1. Use tools provided to teach field staff about brain anatomy.
2. Brainstorm 3-5 risk management strategies and educational opportunities for your program that address common adolescent tendencies.
3. Teach staff about the DVT positive reinforcement tool to decrease behavioral incidents and increase growth-based learning.

### **The Frontier of American Belaying: Changing a Folkcraft to a Science**

*Ron Funderburke*

1. Use one of our Belay Context Models to identify the context of belaying as a risk management tool. Understanding the context of belaying in your program helps make clear policy and operational decisions about how to conduct the practice.

2. Identify what kind of third party validation might best validate your belay practices (recreational credentials, professional credentials, international standards).
3. Adopt the Fundamental Principles of Belaying as a heuristic to refine personal and institutional belay practices, as talking points for intransigent practitioners, and as tool for interpreting unfamiliar belay techniques and contexts.

### **Tools for Behavioral Crisis in the Remote Setting**

*Laura McGladrey, Will Marling*

1. Participants will be able to demonstrate three practical tools for managing challenging behaviors in remote settings.
2. Participants will be able to identify behaviors that present risk to staff and students in wilderness, and will be able to offer clear evacuation plans for out of control program participants.
3. Participants will be able to initiate protocols related to managing self-harm, aggression, and disrupted communication in remote settings.

### **Training Your Staff to be Risk Managers**

*Kate Koons*

1. After you or your staff prioritizes one risk management area that needs better preparation, design an impactful training exercise to meet that goal. At the same time, cut lower priority topics from your training.
2. Identify and address one thing in your organizational risk management culture that is preventing your staff from becoming better risk managers.
3. Align the risk management language in your organization's field staff interview questions, position descriptions, and evaluations.

### **Updates and Overview: Navigating Health, Safety and Security Abroad**

*Bill Frederick*

1. Formulate specific criteria for deciding to go or not to go to a particular destination based on health, safety, and security.
2. Identify 5 components of your international risk management strategy that need work.
3. Formulate a plan with specific steps for improving risk management strategy.

### **What Does the Law Require of Me? How to Determine Your Legal Duties**

*Michael Blaisie*

1. Consult attorney about what laws or regulations apply to your activities.
2. Establish a means to be informed of changes to the law, new laws, or laws that apply to new aspects of your program.
3. Establish procedures for improving your program by examining its own outcomes and the approach of others.

### **When the Tail Wags the Dog: Recognizing and Avoiding Mission Creep**

*Steve Smith*

1. Increase alignment between mission, risk tolerance, and program activities.
2. Develop strategies to identify and mitigate mission creep.
3. Create common language and terminology surrounding the topic of mission creep.

### **Wilderness First Responder Recert**

*Gates Richards, Liam Downey*

1. Renew Wilderness and CPR certifications.
2. Use the course content to compare current trends in wilderness medicine decision-making guidelines with an individual's organization protocols.
3. Develop 3 wilderness medicine scenarios to use in staff training.

### **Wilderness Medicine Panel**

*Tod Schimelpfenig, Greg Moore, David McEvoy, Shana Tarter*

1. Review your organization's spine management protocols and determine whether updates are appropriate.
2. Add a staff training session or briefing that exposes instructors to the basic tenets of psychological first aid and have them practice with a short scenario.
3. Develop message points for customer service staff regarding risks and risk management of mosquito borne illness, including the Zika virus, and practice with phone call drills. Review information on your web site and in participant paperwork for relevance and accurateness.

### **Working with Minors: Legal Issues**

*Cathy Hansen-Stamp*

1. Review your program's participant agreement with legal counsel, focused on its application to minor participants, and their parent/legal guardians. Consider changes to the document specific to your jurisdiction's case and statutory law, the integrity of the agreement's language and other relevant issues.
2. Review your [external] information delivered to minors and their parents. Are you accurately and objectively presenting the program to your public? Consider your word choices, including minor/parent personal responsibilities, the activities and risks, and appropriate consistency among the various 'pieces' of information you develop or distribute. At the same time, review your [internal] staff manual or policies – how do you characterize (for staff) their responsibilities in regard to minors? Is it appropriately realistic, flexible and tracking with your delivery of external information?
3. Assess your current exposure to the risk of sexual abuse occurring in your program or being raised by someone attending your program. Once assessed, work with your legal counsel to understand the applicable law in your jurisdiction regarding the definition of abuse, and reporting or other requirements. Develop a basic plan to address issues of preparation, detection and reaction/reporting/response.

### **You Know Too Much! Understanding and Mitigating Your Expert Blindspot**

*Emily Abell*

1. Locate opportunities: Complete an Assumptions Audit of your risk management approach or principles.
2. Give it a try: Try out at least one of the research methods in your program/population space, ideally matched against one of the items found during your audit.
3. Share what you've learned: Share with your organization the basics of the method you choose, how you applied it to your circumstances, and what you learned from it.