



# 10 Steps To Better Risk Management



Easy to address suggestions based on reviewing dozens of outdoor and adventure programs

- Field Safety
- Crisis Response
- Youth Protection
- Transportation
- Leadership

Edition 2.03 – October 2014  
(1<sup>st</sup> edition titled “5 Weeks to Better Risk Management”)

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## INTRODUCTION

Outdoor Safety Institute's reviewers have evaluated safety practices in dozens of outdoor and adventure programs. We noticed that we regularly make some similar recommendations for potential improvements in safety- and liability-related practices. To assist all outdoor programs in improving their services, we've decided to share some of the recommendations we most frequently make to our clients.

We know that freeing up time to improve your program's risk management practices can be challenging. Some suggestions may take substantial effort to implement, though others can likely be accomplished in a little as an hour. Refer to the next section, "Getting Started," for some more thoughts on making change happen, but we encourage you to set a firm timeframe for tackling the suggestions relevant to your program.

Please understand that OSI needs to be somewhat general with our 10 suggested tasks, as outdoor programs are quite varied and there are many valid risk management approaches. You will need to assess all our suggestions and adapt them as needed to suit your program. Please read the "Reality Check" below—managing risk is a complex task and a big responsibility!

If you have any feedback or questions regarding implementation of these suggestions, please contact us. We consider this to be a living document and appreciate your ideas and input. Thank you for your interest in what we believe to be a critically important topic for outdoor programs!

Sincerely,



Alex Kosseff  
Director

## REALITY CHECK & TERMS OF USE

There are many different types of outdoor, adventure, and conservation programs providing education, recreation, service, and other opportunities. Varied activities, operating areas, leader qualifications, participant populations, equipment, organizational risk tolerance, and many other factors may dictate different risk management approaches than those presented in outline form in this document. Not all of the recommendations in this document may apply to your program, and your program must assess and manage safety in all areas of operation (not just the areas covered in this document). Making operational decisions with risk management implications requires significant expertise, experience and judgment. To optimize risk management, OSI recommends periodic external review of outdoor programs, as outlined on page 20 of this document. As mentioned on the previous page, [OSI's Terms of Use](http://www.outdoorsafetyinstitute.com/pages/terms_of_use/) ([http://www.outdoorsafetyinstitute.com/pages/terms\\_of\\_use/](http://www.outdoorsafetyinstitute.com/pages/terms_of_use/)) apply to any use of this document and the associated downloads.

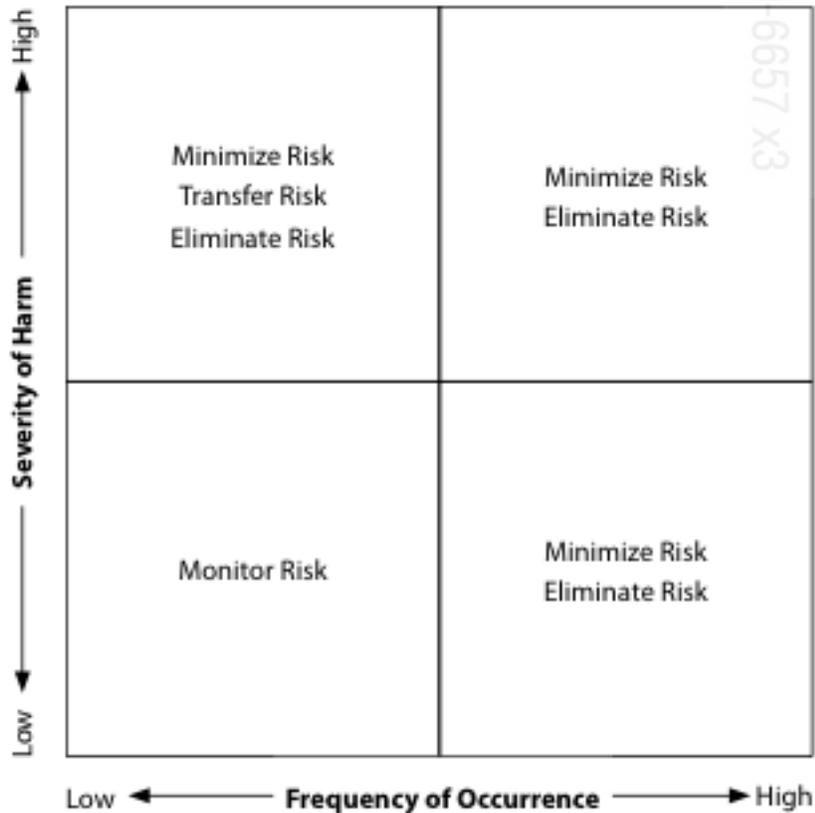


## GETTING STARTED

We realize that you have a lot to do! That’s why OSI has created “10 Steps to Better Risk Management” as a “quick start” guide that is useful for programs at varied stages of addressing risk management. Here are some suggestions for best utilizing this resource.

### Prioritize

Take a look at the 10 steps addressed in this guide. First consider if your program has adequately addressed the step already. If it’s been addressed you can skip it. Among the remaining steps, you can roughly prioritize them using the graph below. To do so you’ll need to define ranges for “Frequency of Occurrence” and “Severity of Harm” that work for your organization. For “Frequency of Occurrence” the range could be once every 20 years (low) to once per course (high). For “Severity of Harm” it might range from field treatable (low) to permanent disability, severe psychological harm, or death (high). The closer the hazard is to the upper right corner of the graph, the higher the priority should be.



(Reproduced from Kosseff, [AMC Guide to Outdoor Leadership](#), 2010)

This is, perhaps obviously, a somewhat crude approach to prioritizing risk—but it is effective enough to be used in establishing priorities. The system works better for some steps, like Water Safety, but less well for others, like Engage Staff, that don’t have clear associations with a specific hazard. Do



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you best and if you're having a hard time prioritizing, we suggest addressing the five steps that have an asterisk next to them first (Water Safety, Missing Participant, Youth Protection, Driver Training, and Engage Staff). We feel that these 5 steps are likely to have the most positive impact on your risk management.

### Timeframe

Efforts to address risk management in outdoor programs often drag on. Once you have prioritized the relevant steps, we recommend setting a timeline for your efforts to address them. For a smaller organization, you might be able to tackle one step a week. A more complex or larger organization might take months to address a single step. Whatever the case, we strongly believe you need a project timeline, ideally one that's built into the work plans of anyone involved.

### Engage People

Effective risk management rarely occurs unless there is broad engagement in the process of creating change. From senior staff and board members to field leaders, the most effective risk management practices engage all levels of your program in establishing practices. This process takes time, but we recommend obtaining input on risk management improvements via discussion (online or in-person) with all of those involved in your program. Engagement efforts pay off in terms of a risk management program more finely tuned to your organization and better buy-in and implementation at all levels!

### Use the Downloads

There are a number of downloads associated with the recommendations in this guide. Many of these feature forms or procedures that can be adapted for use by your program. These can be helpful, but they aren't "one size fits all" and must be adapted to your program's needs and potentially reviewed by your legal counsel, insurance company, or other experts. We also ask that you credit OSI for any material of ours that you utilize—thanks in advance!

### Get Some Help



Feeling stuck? Consider finding a peer at another, similar, program who can give you some guidance. OSI also offers free support (up to 45 minutes) to those utilizing this guide. Please do click the help button ([contact us](#)) if we might be able to assist you in any way. Don't let little (or even big) challenges derail your important risk management efforts.

### Signup for Updates!

If you haven't already signed up for OSI's [Outdoor Safety Newsletter](#), be sure to do so. The newsletter features periodic updates and supplements to this guide, as well as other valuable risk management resources. [Signup now.](#)



# 1. WATER SAFETY\*

## Task: Implement water safety procedures

Why is it important even for a non-water-based program to have easy-to-understand water safety practices? Almost inevitably, you'll run across water that participants will want to explore to some extent, whether by soaking sore feet, searching for fish and insects, or going for a swim. Additionally, depending on program locations, you may need to create water safety practices for river crossing, diving, boating, canyoneering, etc. It's important to identify all of the potential hazards (in this case, water hazards) that your program may face. Here are a number of reasons all programs should have documented water safety procedures:

- To give staff the confidence and competence to address "Can we go swimming?" questions in a consistent manner
- To acknowledge that being around water requires active risk management practices and to outline what those practices look like
- To provide clear boundaries for staff and participants
- To protect against the possibility of legal liability arising from inconsistent water safety practices within the organization

Any documented procedures should be clear and concise, and staff should be trained in these procedures. Try not to mix important safety-related information with other program information—always remember that the more you write, the less your staff will actually understand, retain, and implement.

Because of the risk of catastrophic loss, water safety, along with motor vehicle safety, should be among the top priorities of any outdoor program. One study ([Brookes, 2003](#)) examined available reports of fatalities in Australian outdoor education programs between 1960 and 2002. Of the 114 fatalities identified in the study, 41 (36%) were drowning deaths. Similar statistics aren't available in the U.S. and Canada, but anecdotal evidence suggests that water-related activities account for a significant proportion of serious incidents in the field.

### Resources

[OSI Sample Water Safety Procedures](#) (PDF)

[Outdoor Education Fatalities in Australia 1960-2002, Brookes](#) (PDF)



## 2. LIGHTNING SAFETY

### Task: Implement lightning safety procedures

While lightning does not pose as significant a risk to most outdoor programs as some other hazards (especially water and transportation), it is a hazard that is present in many environments. Lightning is also one of the most misunderstood outdoor hazards, as are the approaches to mitigating this risk. Staff on any program that faces a potential lightning hazard should be prepared with procedures and training on how to minimize the risk posed by this backcountry hazard.

John Gookin with NOLS has done some excellent work in bringing science into the outdoor community's understanding of lightning. His new (2014) book, [NOLS Lightning](#), should be considered the definitive resource on lightning for outdoor program. According to Gookin, there are four actions that can reduce your risk of a lightning strike, with each action being roughly twice as important as the one that follows:

- Time visits to high-risk areas with weather patterns
- Find safer terrain if you hear thunder
- Avoid trees and long conductors once lightning gets close
- Get in the lightning position if lightning is striking nearby

The message about the lightning position has been getting out, and some programs have drilled this into field staff well enough that it is viewed as the most important aspect of lightning safety. Generations of mountain enthusiasts knew nothing about the lightning position, but they had the wisdom to know that peaks, ridges, and high ground were bad places to be in an electrical storm. They were onto something, and location (being on safer terrain) is more important than the lightning position!

As with water safety, any documented procedures should be clear and concise, and staff should be familiar with these procedures. Try not to mix important safety-related information with other program information—remember that the more you write, the less your staff is likely to understand, retain, and implement.

#### Resources

[OSI Sample Lightning Safety Protocols](#) (PDF, Available 12/1/14)

[Backcountry Lightning Risk Management, John Gookin/WRMC](#) (PDF)

[NOLS Lightning, John Gookin](#) (Book on Amazon.com)



### 3. LOST PARTICIPANT\*

#### Task: Implement procedures related to lost participants

This step involves setting up procedures in three areas:

1. Preventing people from becoming separated from others
2. Training participants in what to do if they do become separated
3. Approaches to responding to a missing person

Note: While this section refers to a single missing individual, it is always possible that multiple people will be separated from their group. The principles remain the same regardless of how many missing people are involved.

#### Don't Get Separated From the Group

Have a clear approach for training staff and participants on how not to get separated from others. Start by establishing the expectation that the group sticks together. There may be times where it is appropriate for small groups or even individuals to separate themselves from the group, but this is the exception to the rule.

Participants should know to stay in visual or voice range of others in the group. When leaving the group is important, such as for "toilet" needs, participants should tell someone where they are going. You may even choose to use a "buddy system," wherein you pair up participants and ask the pair to keep track of one another.



#### If You Are Separated

Participants should be trained to stay in place if they become separated from the group. The only exception is if there is a serious threat to their welfare, such as a forest fire, flood, aggressive animal, or the like. It is much easier to locate someone who is in a fixed position than a moving subject.

#### Responding to a Missing Person

Generally, the response to a missing person will begin with collection of some basic information and a hasty search of the area around where they were last seen. After this initial search, the appropriate response will vary with climate, participant population, terrain, activity, equipment carried by the missing individual, potential causes of separation from the group, and other factors. Having a predefined procedure for handling the response will greatly aid in decision-making if this situation ever arises.

### Whistles

Whistles are a great way to signal an emergency, and OSI recommends that everyone on outdoor programs carry one. We're fans of Fox 40-brand whistles, which are durable and louder than most other models. The [Fox 40 Micro](#) is a good option for wearing around the neck, while the [Fox 40 Classic](#) is a little louder but bulkier. Three blasts on a whistle is a well-recognized distress signal. Be sure to let participants know that blowing their whistle is akin to dialing 911!



### Resources

[OSI Draft Lost and Alone Procedures](#) (PDF)

LOST PARTICIPANT



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## 4. YOUTH PROTECTION\*

### Task: Implement procedures for protecting youth from abuse

If your program involves youth (or vulnerable adults), you must take reasonable steps to provide an emotionally safe environment and prevent abuse. This includes efforts to prevent bullying, neglect, physical abuse, emotional abuse, or sexual abuse on your programs.

Program staff, volunteers, fellow participants, or others may perpetrate abuse. As with all the topics addressed in the guide, proactive prevention is the best approach. Good practices can prevent many incidents and are the focus of this “Youth Protection” step; although, some next steps are also mentioned below.

Consider these scenarios and how they would be handled in your program:

**Situation 1:** While fishing, a 17-year-old female participant on a river canoe trip hooks a fly very close to her eyeball. The two instructors (one female lead instructor and one male assistant instructor) decide she needs to be evacuated. It is still 4 days paddling to the next takeout on the river, but there is a five mile hike out to a trailhead where a program vehicle can meet them. Who should accompany the participant on the hike out and the ride back to town?

**Situation 2:** The two leaders on a backpacking trip for 13- and 14-year-olds notice that trip participants seem to be using one male participant as a scapegoat and blaming him for many of the groups’ problems. When one leader checks in with him he reluctantly reports that he’s being bullied by his two tentmates. What should the leaders do now? What should they have done previously?

**Situation 3:** On a volunteer-led road biking trip, an experienced female leader in her 40’s declines to share a tarp with her co-leader. She moves her sleeping bag into a tent with two 15-year-old female participants, saying that she prefers to be in a tent with mosquito netting. What should her co-leader do?

If you have clear answers to how these situations would be handled in your program and why this is the case, consider moving onto the “Next Steps,” below. If not, there are some procedures and leader training that may need to be put in place. Providing for emotional safety and preventing abuse or neglect is a complex task. We cannot provide all the answers here, but the linked resources including OSI’s Youth Protection Guide (available January 2015) should help.

### Next Steps

We’ve tried to keep the 10 steps (relatively) simple. To stay in line with this, we’ve only addressed one aspect of a comprehensive youth protection program in this section. Once you’ve implemented procedures for

protecting youth, here are two more critical aspects of youth protection that should be covered:

**Investigating and/or Reporting Potential Abuse:** Every program, regardless of size, should have a procedure for responding to allegations or signs of abuse. This procedure should function regardless of who the potential perpetrator is, so it can't be reliant on any one individual. Too many organizations have failed in their responsibilities to investigate abuse—including numerous outdoor programs. Don't fall into the "that would never happen here" trap or exempt anyone from investigation or reporting. Developing a solid system for reporting and investigation, before abuse allegations surface, is essential to handling any allegations.

**Staff Screening:** An appropriate criminal background check should be conducted on all staff members who will be working with youth (and possibly on all staff). This check should occur before the hiring process is complete and periodically after hiring. Screening should not be limited to the background check; this process also includes a comprehensive hiring process including relevant, documented reference checks. This recommendation applies equally to paid and volunteer staff members.

#### Resources

[OSI Youth Protection](#) (PDF, available 1/15/15)

[CDC – Preventing Child Sexual Abuse](#) (website)

[American Camp Association – Child Abuse Prevention](#) (website)

[The Season of Hope: A Risk Management Guide for Youth-Serving Nonprofits](#) (Book on Amazon.com)

## 5. DRIVER TRAINING\*

### Task: Implement a system for training drivers

Driving, not field activities, may present one of the larger risks of catastrophic injury or loss of life on your outdoor program. The vehicles most often utilized—15-passenger vans—are not the easiest to handle, and many drivers are inexperienced with these or other larger vehicles. Add towing a trailer to the mix, and things get more challenging.

Alex Kosseff, OSI's founder, says, "When I first started driving a 15-passenger van for an outdoor program, my only training consisted of being told, 'It's not like driving a car; you just aim it in the general direction you want to go and hope for the best.'" 20 years later, we can do better than this. While vehicle handling and safety features have improved, driver training, a proven way to reduce risk, has not become ubiquitous.

### Components of Driver Training

Drivers for outdoor programs should be provided with professional driver training based on defensive driving principles. Components of a robust training program include engaging lessons (classroom, self-study, or online), time behind the wheel, and assessment. Be sure to address any specific issues that may potentially impact your transportation program. These may include, but are not limited to:

- Driving on dirt and/or gravel roads
- Utilizing trailers
- Driving in icy/snowy conditions
- Driving on steep and/or narrow roads
- Program vehicle controls, features, and handling
- Transporting equipment and passengers together
- Other unique features/hazards of your driving operation

### Classroom, Self-Study, or Online

There are a wide array of driver training programs available, including some specific to certain types of vehicles. Most of these training options will need to be supplemented with additional information specific to your program's transportation situation.

### Behind the Wheel

OSI recommends training on the street supervised by an experienced trainer. We also suggest utilizing a "cone course," which allows for training to failure. [Download OSI's guide](#) to setting up and training on a cone course.

### Assessment

Many training programs include some form of written or online testing. OSI believes that observation of behind-the-wheel skills is important as well.



Assessment of basic driving skills based on a simple checklist should be a prerequisite of professional driving responsibilities.

### Check the Regulations

Some states and jurisdictions may require a commercial driver's license or other licensing for drivers of certain vehicles. Be sure to be aware of the training and licensing requirements in your areas of operation!

### Resources

[OSI Cone Course Article](#) (website)

[OSI Setting Up A Cone Course](#) (PDF)

## 6. VEHICLE MAINTENANCE

### Task: Implement an accountable vehicle maintenance system

Many outdoor programs lack one person who has the job of keeping the program's vehicles in top shape. As a result these tasks fall through the cracks. Low tire pressure, poor windshield wipers, insufficient motor oil, routine maintenance schedules, etc., are examples of issues commonly missed or overlooked while operating a vehicle. At the least, this consistent neglect can lead to significant maintenance costs, and on the other end of the spectrum, could lead to a serious accident.

Outdoor programs have many challenges with vehicle safety. OSI has found vehicle maintenance to be a consistent challenge among a variety of organizations. Maintenance is also pretty easy to fix by implementing the following three steps.

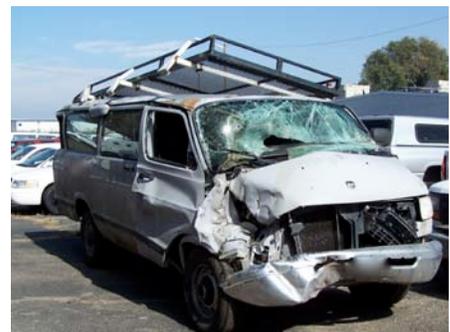
1. Identify the periodic maintenance needs of vehicles, set up a maintenance schedule, and designate a person responsible for making it happen
2. Have a pre-trip vehicle check that addresses common problems (lights, horn, visual check of tires and wipers, etc.)
3. Have a system for reporting vehicle problems and making sure that they are rectified

### Another Approach

Have you considered contracting another well-qualified organization to handle some or all of your transportation needs? Contracting with a provider such as a bus company can be an effective approach to reducing actual risk and transferring some remaining risk to another company. This may reduce or eliminate the need to maintain program vehicles and can be cost effective, especially for seasonal programs.

### Don't Go There (Roof Rack Rant)

However tempting it is to add a roof rack onto 15 passenger vans, don't do it! These vehicles already have a high center of gravity that contributes to their propensity to roll over. Weight on the roof raises this center of gravity even higher, making the rollover risk even greater. Always check the vehicle manufacturer's recommendations before utilizing a roof rack.



### Resource

[OSI Sample Pre-trip Vehicle Checklist](#) (PDF)



## 7. ROLE CLARIFICATION

### Task: Implement clarified position descriptions

Clarifying position responsibilities creates and promotes ownership and accountability to the jobs at hand, and reduces the likelihood of tasks going undone because “somebody” will do them. Defining roles is a simple step that can establish a foundational structure and add to an organization’s overall strength. OSI frequently identifies important responsibilities that are not clearly assigned to anyone.

Below are a few situations that are meant to highlight some of the details that we suggest you consider when defining position descriptions. We suggest both a written and oral review of these defined roles and descriptions with all staff members to ensure their understanding, and simultaneously provide opportunities for clarification or revision.

**Situation 1:** Your outdoor program operates with two leaders per group. It’s day one of the trip; the gear and participants are loaded in the vehicle and secured. Everyone is excited to get into the field and start. The trip is finally under way. Who checked the oil in the vehicle? The tires? Is the trailer loaded and attached correctly?

**Situation 2:** The program director sends a trainee into the field with a lead instructor. They’ve never met before this day. What are the lead instructor’s responsibilities, if any, in training or mentoring the trainee?

**Situation 3:** The “on-call” employee receives a phone call. It’s the first crisis of the season, and requires knowledge beyond that possessed by the employee. What is the next step? What system covers this situation?

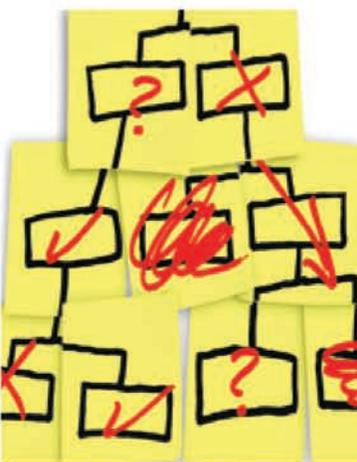
OSI sees a strong positive trend in performance and safety among organizations that clearly define roles among all staff members. Defining roles is especially important within organizations with frequent staff turnover, seasonal employees, employees newer to the workforce, and volunteers.

Having defined roles promotes a sense of responsibility and clear expectations, allowing for direct feedback regarding staff strengths and deficiencies. It also promotes a training progression and structure for exploring the development of employees. These details can inform necessary staff training and risk management concerns.

Many organizations have position descriptions but don’t utilize, update, or reference them. We encourage you to intentionally use these documents throughout the evolution of individual staff members and the organization. They can be referenced during interviews, staff meetings, trainings, and as the organization considers adding a new position, just to name a few.

#### Resource

[OSI Sample Staff Roles and Responsibilities](#) (PDF)



## 8. SUBCONTRACTORS

### Task: Evaluate risk management practices of subcontractors

Subcontracting is a common occurrence in outdoor recreation and outdoor education programs. Transportation, whitewater boating, horseback riding, and climbing activities are among the most frequently subcontracted. To help ensure reasonable risk management on subcontracted activities, OSI recommends, at a minimum, that all current and prospective subcontractors be evaluated in a systematic fashion.

Subcontracting provides several potential benefits; it:

- Allows for a broader spectrum of activities
- Provides for specialized activity or area expertise
- Allows access (when the primary organization cannot obtain a use permit)
- Transfers risk to a better-qualified organization
- Provides the required equipment, vehicles, livestock, etc.

OSI encourages our clients to subcontract activities outside of their core area or areas of competency. Developing a new program with adequate risk management practices is often a more significant undertaking than it initially appears to be, and subcontracting can be a better solution.

Subcontracting, however, is not an effortless solution, and presents a unique set of risk management challenges. Among these challenges:

- The subcontractor's tolerance for risk may vary from your organization's
- Varied risk management of ancillary activities (e.g., transportation)
- Staff members who aren't skilled at working with your client population
- Inadequate insurance coverage
- Crisis response procedures that vary from your organization's

A subcontractor with risk management practices that vary from your organization's could expose your participants to unwarranted risk and your organization to potential legal liability. There may also be reputational risks, as participants and the public are unlikely to fully differentiate your organization from a subcontractor conducting activities on your behalf.

#### Basic Evaluation Tool

Many subcontractors for outdoor programs are engaged based on personal relationships or informal evaluation. The detailed "Subcontracting for Outdoor Programs" guide provides a questionnaire that can be utilized to evaluate potential subcontractors' risk management. While the "Subcontracting for Outdoor Programs" questions cannot address every

risk, and interpreting the answers requires significant knowledge and judgment, making use of these questions will potentially address some of the most significant risk management concerns related to subcontracted programs.

### **Obtain an External Assessment**

Third-party risk management reviews, such as those OSI offers, or accreditation that solidly covers risk management, can be the strongest tools for evaluating risk management and other aspects of a potential subcontractor's operations. Unless the third-party review has already been conducted (or the subcontract is a large one), this may be a high bar for many potential subcontractors to meet.

### **Additional Options for Vetting Subcontractors**

- **Obtain References:** References from past client organizations can be valuable.
- **Talk to a Land Manager:** Land managers in the area where the subcontractor operates may have a good feel for the practices of a potential subcontractor.
- **Participate in a Program:** Participating in or observing a program can be a good approach to learning about a potential subcontractor's practices.

### **Resources**

[OSI Subcontracting for Outdoor Programs](#) (PDF)

[OSI Subcontractor Questionnaire](#) (MS Word)

## 9. CRISIS RESPONSE

### Task: Conduct a crisis response training scenario

We often recommend that our clients run a crisis response scenario when first evaluating their risk management. This is similar to a first aid scenario applied to an entire program. A good crisis response scenario makes staff at all levels of your organization work together, can help identify gaps in the crisis response structure of the organization, and gets everyone thinking about risk management.

Considerations when running a crisis response scenario:

- Be well-prepared. Frame the scenario and its intended outcomes.
- How long do you want this to take?
- We recommend, in an effort to keep this exercise useable and attainable, choosing one or two locations near one another, possibly including one outside location. One location will be the emergency scenario, which will include field leaders and mock participants; the other space will be the administration or the response team from the front country.
- Consider asking a member of the local search and rescue team to participate or observe. He or she could help provide feedback, share experiences, or participate in the scenario.
- We encourage programs to run through this scenario, including such steps as performing first aid and utilizing emergency communications devices. On the administrative side, you will need to simulate the notification of necessary parties, which may include search and rescue, the patient's emergency contacts, families of other participants, your insurer, the media, and even the public (via a press release, Facebook, Twitter, or an update on your website).
- Facilitate a debriefing following the scenario. Frame the intent of the debriefing and expected outcomes. Identify what went well, what could have gone better and why, and as always, don't let the debriefing drag on too long. Make a plan to communicate any modifications that need to be made to the crisis response plan.

#### Resource

[OSI Sample Crisis Response Scenarios](#) (PDF, available 11/1/14)

## 10. ENGAGE STAFF\*

### Task: Ask staff about their risk management concerns

At every review OSI conducts, we interview a number of people, including field leaders. During every review, at least one leader says, “I’ve been saying this for a long time” in reference to a risk management concern. Much of the time, it’s a valid concern.

A survey:

- Lets staff know that the program cares about what they have to say
- Can highlight safety concerns
- Provides another avenue for feedback exchange
- Can inform necessary changes to a program’s risk management practices

Responses to a survey can:

- Create a sense of ownership and investment when future changes are implemented, as opposed to the potential for resistance
- Increase overall program quality, especially in regard to safety

When creating a survey, consider:

- Will it be anonymous?
- Format: paper, electronic, oral dialogue, etc.
- When and how you will follow up and respond to those surveyed
- Clearly limiting each staff member to one concern, forcing them to prioritize and avoiding an even bigger list of concerns

While it is tempting to focus only on the most common responses or the scariest concerns (and you may want to deal with these first), you need to evaluate all of the responses. Deciding not to address certain concerns is a valid response, but to protect your program legally, you at least want to document that you considered all hazards. This will require some subjective assessments, but you can use the graph from page 5 of this guide to help prioritize your responses to risk management concerns.

### Resources

[SurveyMonkey](#) (website)

## NEXT STEPS

By committing time to tackling those risk management suggestions in this report that apply to your outdoor program, your risk management efforts have likely gained significant momentum. Here are a few suggestions on some next steps that can help your organization continue its forward progress:

### ASSESS YOUR OPERATION

#### Conduct a Risk Management Review

Each outdoor program is unique and, unfortunately, each program has somewhat unique risks. Among prominent outdoor education and recreation programs in the U.S. including Outward Bound and the National Outdoor Leadership School, risk management reviews are commonplace. Why do programs conduct reviews? Because they believe, like OSI does, that an objective evaluation (or review) of risk management practices is one of the best tools to improve organizational risk management. No checklist or list of suggestions can substitute for a comprehensive review resulting in customized recommendations.

You can conduct your own informal risk management review. While this is better than no review, it is difficult to be totally objective and up-to-date on good risk management practices for all areas of your operation. Better options include: peer review by professionals from similar organizations, or a [professional risk management review](#) conducted by OSI. An added benefit of an external reviewer (or reviewers) is that their assessment often carries more weight than a review by internal staff. Whatever path you select, be certain to carefully structure the review process. Effective reviews are collaborative in nature, and result in a clear road map for risk management improvements.

### EDUCATE YOURSELF (AND OTHERS)

#### Outdoor Safety Institute

Visit the [News & Resources](#) section of the [OSI website](#), sign up for the [Outdoor Safety Newsletter](#) (and read back issues), and “like” the [OSI Facebook page](#) for regular updates on outdoor risk management topics.

#### Wilderness Risk Management Conference

The annual [Wilderness Risk Management Conference](#) is held in a different location in the U.S. or Canada each fall. This is probably the best place to learn about outdoor risk management, including the latest developments.

#### Do Some Reading

We like books. The following two pages list a number of resources that may be useful for risk management planning, leadership training, and educating others. (Note: Links to Amazon.com are affiliate links. Using the links does not change the price or provide us info on your actions, but returns a small percentage of the purchase price to OSI. We appreciate the support!)



## RESOURCES

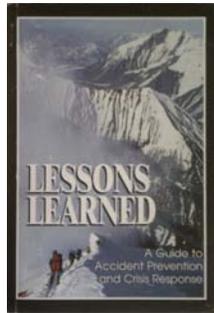
# RESOURCES



***Managing Risk: Systems Planning for Outdoor Adventure***  
**Jeff Jackson & John Heska**

This is the most comprehensive resource available on risk management planning for outdoor adventure programs. It is a thorough and coherent introduction to modern risk management systems. Available only via Direct Bearing.

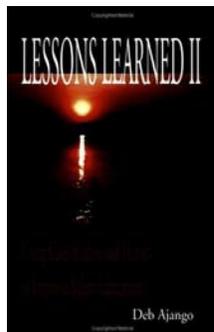
[Purchase from Direct Bearing Inc.](#) (Paperback)



***Lessons Learned***  
**Deb Ajango, Editor**

*Lessons Learned: A Guide to Accident Prevention and Crisis Response* was written after the 1997 University of Alaska Anchorage multiple fatality incident and makes a strong case for improved risk management. It's out of print; if you can't find one, [contact OSI](#) and we can sell or loan you a copy.

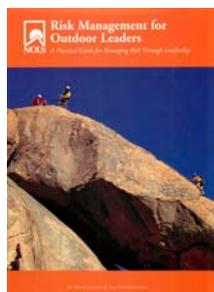
[Purchase on Amazon.com](#) (used copies may be available)



***Lessons Learned II***  
**Deb Ajango, Editor**

*Lessons Learned II: Using Case Studies and History to Improve Safety Education* is an essential examination of how outdoor program accidents happen and how training can be improved to prevent them. It covers substantially different ground than the original *Lessons Learned* and is a more polished work.

[Purchase on Amazon.com](#) (Paperback)

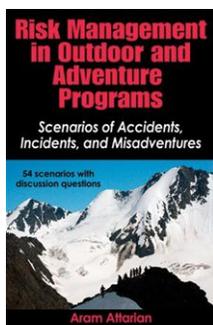


***NOLS Risk Management for Outdoor Leaders***  
**Drew Leemon & Tod Schimelpfenig**

Subtitled, "A Practical Guide for Managing Risk Through Leadership," this short (60 page) publication is a valuable source of ideas for training leaders (and participants) to be better risk managers. It is available directly from NOLS as part of their "Notebook" series of publications.

[Purchase from NOLS](#) (Spiralbound)

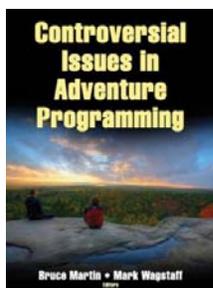




***Risk Management in Outdoor and Adventure Programs***  
**Aram Attarian**

Subtitled “*Scenarios of Accidents, Incidents, and Misadventures,*” this resource presents over 50 mini-case studies. Each scenario is accompanied by discussion questions making it useful for either leader training or individual reading. There are introductory sections on risk management and legal concepts.

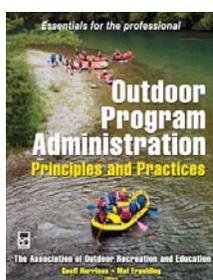
[Purchase on Amazon.com](#) (Paperback/Kindle)



***Controversial Issues in Adventure Programming***  
**Bruce Martin & Mark Wagstaff, Editors**

Presented in a debate format with an impressive array of experts arguing different sides of important topics. Roughly half of the 20 topic areas are risk management focused, but the varied opinions expressed may leave readers with more questions than answers!

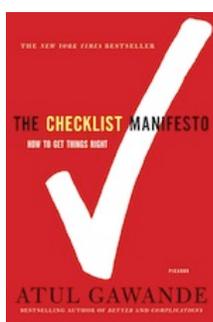
[Purchase on Amazon.com](#) (Hardcover/Kindle)



***Outdoor Program Administration: Principles & Practices***  
**Geoff Harrison & Mat Erpelding, Editors**

This volume has received little promotion but should probably be the standard text for overall outdoor recreation management. Developed by the Association of Outdoor Recreation and Education (AORE) it features guidance from many leading outdoor professionals.

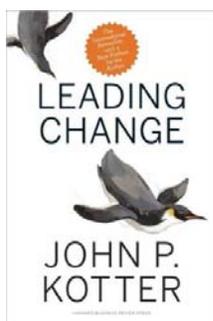
[Purchase on Amazon.com](#) (Hardcover/Kindle)



***The Checklist Manifesto: How to Get Things Right***  
**Atul Gawande**

This bestseller isn't a specific to our outdoor and adventure world. It is an eloquent case for why people working in all sorts of fields need checklists to get things done right. It is a good read for those in outdoor education and recreation trying to manage leaders or instructors with varied skill sets.

[Purchase on Amazon.com](#) (Hardcover/Paperback/Kindle)



***Leading Change***  
**John P. Kotter**

Organizations, especially larger ones, are resistant to change. Improving risk management practices often requires exceptional leadership insight and skills. This volume, published by the Harvard Business School, helps inform much of OSI's work with complex organizations.

[Purchase on Amazon.com](#) (Hardcover/Kindle)