

GUIDE TO SETTING UP AN EMERGENCY ACTION PLAN FOR RECREATIONAL ACTIVITY PROVIDERS

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TABLE OF CONTENTS

Guide to Setting Up An Emergency Action Plan

Page 3-23

APPENDIX

- A. Crisis Contact Form – Sample
- B. External Notification Form – Sample
- C. Corporate Contacts – Sample
- D. Media Release – Samples
- E. Incident Report Forms – Samples
Witness Statement Form – Sample
- F. Safety and Risk Management Resources



I. What is an emergency/crisis?

There are lots of definitions, but here are a few:

Emergency = (1) : an unforeseen combination of circumstances or the resulting state that calls for immediate action; (2) : an urgent need for assistance or relief.

Crisis = (1) An unstable situation of extreme danger or difficulty; (2) An event that brings, or has the potential for bringing, an organization into disrepute and imperils its future profitability, growth and possibly its survival.

II. How is an emergency/crisis defined with respect to your operation?

Is it when a:

- Rafting guest drowns?
- Guest goes missing?
- Van carrying guest crashes on the way to venue?
- Climbing guest falls off wall and/or down rocky slope?
- Guests caught in avalanche, mudslide, forest fire, rockslide, flash flooding, or other extreme weather?
- Fire destroys your outpost facility?
- Guests get food poisoning on trip?
- Guest has seizure, goes into allergic shock, or has other health-related problem while in remote field?

How you answer this question will vary with respect to your individual operations, however, one thing is certain, if you aren't prepared, things can snowball quickly and negatively.

III. What Are the Primary Priorities When an Emergency Occurs?

1. Preserve the safety of human life
2. Stabilize the situation to prevent event/circumstances from worsening
3. Use all necessary containment and removal tactics in a coordinated manner to ensure a timely, effective response, and
4. Address all of these priorities concurrently

IV. Other Significant Priorities to Consider

1. Effective communication and interaction with other interested parties (for ex. Family members of injured, lost or deceased)
2. Maintaining business survival
3. Minimizing response costs
4. Maintaining public and customer image/reputation
5. Evaluating prospects of criminal prosecution
6. Avoiding citation or adverse effect on permits by Federal and/or State agencies

7. Meeting certain reasonable expectations of owners and stakeholders
8. Avoiding claims resulting in higher insurance premiums

V. What is an Emergency Action Plan and What Purpose Does it Serve?

An Emergency Action Plan is not a steadfast policy document (as unique and fluid circumstances may arise where deviation is necessary); rather it is guidance for response personnel.

The purpose and goal of an Emergency Action Plan is to create an easy job reference aid to emergency responders. It helps works towards the above-stated goals.

VII. When to set up an Emergency Action Plan?

The time to set up and become familiar with an Emergency Action Plan is not as an incident is occurring. It is important for you establish your plan ahead of time. Similarly, it is important for you and your employees to review the contents of your Plan and become familiar with the concepts on an ongoing and regular basis. Consider conducting mock drills, responding to a hypothetical catastrophe, perhaps with the participation of applicable agencies (Sheriff, Search & Rescue, Park Service).

VII. How Should an Emergency Action Plan be Structured and What are Some Things To Consider Including?

[The following is intended to serve as basic guidance, advice and helpful hints to get you started in creating your own written plan. It is not designed to be all-inclusive, and it is not intended to be a replacement for training, experience or common sense.]

One commonly used and recommended approach is to follow the Incident Command System (ICS) model. ICS is the combination of facilities, equipment, personnel, procedures, and communications operating within a common organizational structure with the responsibility for the management of assigned resources to effectively accomplish stated objectives pertaining to an incident. The following information generally follows the ICS approach.

A. Have a Pre-Established Chain of Command

For recreational activity providers, such as rafting companies, mountain bike tours, horseback riding tours and the like, an effective approach is to have established leadership roles/chain of command, each tasked with different duties.

Sample Structure:

- (1) Incident Commander
- (2) Trip leader/ On-Scene Manager
- (3) Accident Investigation Coordinator
- (4) Logistics Coordinator
- (5) Media Spokesperson (designate an "alternate" or back-up during extended crises)
- (6) Injured & Family Relations Coordinator/Liason

B. Assign, State, Know and Execute Roles.

Each person in the Chain of Command should have some pre-assigned and different duties. The goal is to avoid overlap and duplicative efforts, and to promote efficient response and resource allocation.

Sample Identification of Roles:

(1) **Incident Commander** – The Incident Commander is responsible for leadership, decision-making, and oversight of the entire operation. This responsibility requires management experience, knowledge of Search and Rescue operations, diplomacy skills, people skills and a broad sensitivity to organization's interests.

Exemplar duties/tasks/responsibilities of the Incident Commander.

- Activate the initial response:
 - Coordinate with company owner to designate positions:
 - Trip Leader is the default On-Scene Manager until designated On-Scene Manager arrives
 - Accident Investigation Coordinator
 - Logistics coordinator
 - Media Spokesperson
 - Family Relations Coordinator
 - Establish a means of communication with the leader in each position
 - Take factual notes from communications, and for each, include caller identification and time.
 - Consider delegating responsibility to another employee to create and maintain a timeline, including times and tasks accomplished
 - Determine what, where, and when the emergency is
 - Determine number of injured persons and nature of injuries
 - Locate trip list (so you can account for everyone)
 - Determine whether the incident exceeds the routine capabilities of the organization, and if appropriate (err on side of caution), call 911
 - Determine if the scene is safe enough for a response and/or what measures can be taken in order to secure the scene (Do conditions exist that may threaten response?)
 - Establish Incident Command Center/staging area (if appropriate)
 - Dispatch manager to incident site if necessary
 - Determine which drivers and guides are on the trip
 - Determine what care is being given to the injured and where they are being taken
- Oversee the entire operation
- Dispatch Family Relations Coordinator to the ER if necessary
- Be sure Trip Leader/ On-Scene Manager obtains witness statements

- Notify home office/executive management (if you are part of larger operation), let them know what is going on and put them in touch with Logistics Coordinator, so arrangements can be made if they wish to be on site.
- Notify Tour Group Company/Coordinator if injured/deceased was part of an organized tour
- Work with Accident Investigation Coordinator to assemble a Report with pertinent information that can be distributed to law enforcement, other agencies, the permitting agency, and resort where trip originated. It should include what happened, where it happened, when it happened, who was involved, and the status of the injured.
 - Be judicious and careful, and act under the assumption that whatever you provide may eventually end up in the media, and it will surely be discoverable in the event of a lawsuit. Once a document/information leaves your possession, you have essentially lost all control of it.
- Also work with Media Spokesperson regarding a press release.



(2) Trip Leader and/or On-Scene Manager procedures - Responsible for organizing and implementing the response in the field. The Trip Leader sounds the alarm, triggering the Plan!

Exemplar duties/tasks/responsibilities of the Trip Leader/On-Scene Manager:

- Assess emergency (figure out what is going on before you act and risk putting yourself or others in danger)
- Undertake immediate and reasonable rescue effort, where possible and prudent.
- Call 911, search and rescue, park service (if applicable) and other assistance where needed
 - Provide only factual information
 - Remember 911 calls are recorded!
 - Provide specifics about your location and, if you know, the best way it can be accessed by responders
- Trigger the Plan: Trip Leader recognizing catastrophic incident should call (or direct someone to call) the company ASAP, and ideally speaking with the Incident Commander
 - Common Catastrophic incidents for rec. activity providers: staff or guest becomes lost, seriously ill or injured, or is involved in a fatality, serious criminal activity, a natural disaster, or in any other situation likely to attract media attention.
- Establish immediate on-site priorities & manage the immediate response.
- To the extent possible (if at all), cordon off and preserve the scene in a representative condition
- Get a clear picture of the nature of the incident and relative safety of the scene
 - Determine whether more resources are necessary, and contact Incident Commander regarding such resources
- Make sure all guests and staff are accounted for
- As reasonably possible under the circumstances, try to make the scene stable and safe for rescuers, responders, law enforcement, emergency personnel and other participants.
- Designate someone to direct first aid and someone to direct communications if staff are available
 - If helicopter evacuation is likely needed due to location, find and communicate closest suitable landing area
- Oversee the first-aid and communications
- Restrict access to site, if possible, to responders, rescuers and the like.
- Communicate with Incident Commander to provide updates and receive direction
- Determine the needs of other trip guests
 - For example: Transportation, food, shelter, dry clothes

- First-aid:
 - Treat/Aid in treatment of injuries
 - Direct medical personnel and law enforcement to the injured
 - Confirm the exact identity of anyone injured and/or deceased
 - Aid in Transport/evacuation of injured
- Describe the incident to the Accident Investigation Coordinator
 - Any statements need to be basic statements of facts without emotion, speculation, guessing, opinion or judgment (*i.e.* a boat flipped and one person received a head wound from contact with a rock, first aid has been applied, emergency personnel responded to the scene and provided treatment, injured party is being transported to advanced medical care)
- More on On-Scene Communications:
 - Remove the guests from the immediate incident site
 - Communicate with guests concerning the facts, and tell them that a plan is in place
 - Obtain witness statements (note –prepared forms to hand out can aid you in this process):
 - In some cases, law enforcement will seek to obtain their own statements from guests, guides and witnesses. If possible, see if you can participate/listen in. Do not interfere with police investigation. If you are unable to listen in, see if guests, witnesses and guides will tell you immediately after what they told police ...takes notes, or have them write it out for you on their own.
 - The police investigate for criminal charges (though in most cases none result). Do not rely on them to obtain or provide statements or information for or to you. Obtain these things on your own. Similarly, the police should conduct their own investigations and not rely on yours. You are not obligated to provide your witness statements to the police. If they request such, put them in touch with Incident Commander.
 - If an agency (like the Park Service) also requires witness statements on their own or using their forms, find out how you can obtain/make a copy.
 - Employee witnesses are entitled to legal representation, if they wish, but they must request it. Make it available and inform employees of their rights (Please note, this is true with police, OSHA, Park Service, etc.)
 - Employee should also be advised that in most cases, if they are volunteering information, it can be recorded regardless of their knowledge or consent. (Check with your counsel, find out what the law is in your state)
 - Communicate with Logistics Coordinator to determine how to get the guests away from scene/area and back to homes/hotels
 - Communicate sympathy for misfortunes; do not communicate liability or apology
 - Photograph and document the scene
- Gather and set aside any equipment involved
- Trip Leader/On-Scene Manager should stay with the group through the conclusion

- All media contact should be with the designated media person; guides cannot comment on the situation
- Provide photos, witness statements, equipment involved, *etc.* to Accident Investigator
- Complete your own statement and provide to Accident Investigator

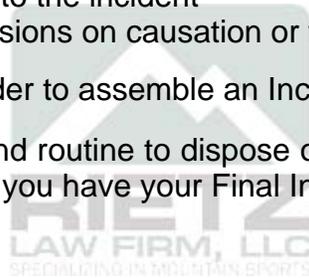


(3) Accident Investigation Coordinator – Responsible for gathering relevant data about the incident and developing strategies for successfully concluding it.

Exemplar duties/tasks/responsibilities of the Accident Investigation Coordinator

- Take calls and disperse them accordingly. Write down all pertinent information.
- Obtain and compile such things as (note –prepared incident report forms can aid you in this process):
 - Name, time, date of trip
 - Time of incident
 - Time emergency dispatch was called
 - Time when emergency crews arrived on scene
 - What emergency crews arrived on scene (flight/ambulance/search and rescue)
 - Number of persons injured & fatalities
 - Nature of injuries
 - Injured guest's relevant past medical history if available
 - What care is given to injured
 - Where have injured been taken
 - Names and contact details of Trip Leader, guide crew, and drivers on the trip
 - Name and contact details of the Incident Commander, Logistics Coordinator, Accident Investigation Coordinator, Media Spokesperson, and Family Relations Coordinator
 - Trip Leader qualifications
 - Name and qualifications of guide whose guest was injured
 - Injured guest's name, age, gender, full mailing address, phone number, email, social security number, insurance information, emergency contact
 - Obtain list of all trip participants and staff with contact details
 - Copy trip manifest for participant names
 - Copy participant releases
 - Name and contact number of person/people giving first aid
 - Final medical doctor conclusion and diagnosis, if available (Note – Privacy laws, such as HIPPA, may prevent doctors, hospitals or other medical personnel from providing you with this information)
- Document location and conditions at incident site – weather, air temp, water temp, wind and other conditions, where appropriate, such as water flow, snow conditions, snow depth and the like.
 - Take measurements, if appropriate (don't guess or speculate as to such things as time, speed or distances).
 - Take and record photographs
- Obtain materials (witness statements, photos, equipment) from Trip Leader
- Inventory and photograph equipment involved, do not alter it, and, if possible, set it aside, start a chain-of-custody log, and do not put equipment back into use until Incident Commander and counsel approve (note- law enforcement, permitting agencies, etc, may also wish to inspect equipment before it goes back into use).

- Photograph all warning, assumption of risk signage or the like (in shop, staging area, at outpost facility, etc) that guests would/could see
- Obtain Screen Shots of all information on your website, in particular warnings, assumption of risk language, and exemplar releases.
- Describe incident, using factual information only (not guessing, speculation, opinions, etc)
 - What were the events leading up to the accident including the actions of guides and passengers
 - Events of incident in injured's own words
 - Events of incident in guide's own words
 - Event of incident in Trip Leader's own words
 - Events of the incident according to witnesses (other staff, guests, public)
 - List of the actions taken after the incident
 - List of warnings, instructions, and information provided – note information, if provided, as to whether these warning and instructions were heeded
 - Identify statements regarding whether the injured caused or contributed to the incident – and whether the injured stated he/she caused or contributed to the accident
 - Identify statements from and regarding whether another person, not an employee, caused or contributed to the incident
 - DO NOT reach conclusions on causation or fault! Simply document the facts.
- Work with Incident Commander to assemble an Incident Report
- Make it your custom, habit and routine to dispose of all drafts and notes of drafts (including saved computer drafts) once you have your Final Incident Report.



(4) Logistics Coordinator –Supports the Search and Rescue operations with vehicles, food, equipment, and facilities

Exemplar duties/tasks/responsibilities of the Logistics Coordinator:

- Communicate with company staff, resort/hotel/outpost where trip originated, attorney, insurance representative
- Notify law enforcement (if not already involved) and permitting agencies (if required)
- Communicate with Incident Commander to organize vehicles, food, equipment and facilities for the rescue operations
- If rescue operations will likely be lengthy, plan for it
 - For example, if they go into night, provide lights, headlamps, heaters, batteries, extra radios, hot meals, water, *etc.*
- Reorganize operational logistics if necessary –cancel, continue, replace staff for this and subsequent trips, contact other “friendly” activity providers in area and see if they can help with any overload
- Address post-incident psychological and emotional needs of guests and staff
 - Contact licensed counselors/grief counselors, where appropriate
- Obtain the Incident Report from the Incident Commander and, if with approval of owner and legal counsel, and working with Media Spokesperson, distribute to permitting agency, resort where trip originated, law enforcement, other outfitters, other agencies, and all staff
 - List the recipients of the Incident Report Form, and make follow-up calls to these recipients
 - Again, be judicious and careful, and act under the assumption that whatever you provide may eventually end up in the media, and it will surely be discoverable in the event of a lawsuit. Once a document/information leaves your possession, you have essentially lost all control of it.
 - Let Media Spokesperson handle the press, and let him/her determine what is released to them.
- If someone needs help getting something, locating something, obtaining rescue supplies, *etc.*, you are the person to make it happen.
 - Be proactive and try and think ahead! (For example, if injured party is to be released from hospital, you have already found out what transportation arrangements he/she will need, if any, and you make the arrangements ahead of time)
- Post incident follow-ups and conclusion
 - Critical incident stress debriefs with participating staff and whole company to address the psychological and emotional needs of staff
 - Consult with media spokesperson, as people who have upcoming trips may call and ask about the incident.
 - The company’s staff will need to be prepared with simple, but accurate answers

- The most common question will come from people who heard about the matter in or on the news, and that question is: “Is it safe to go rafting/hiking/climbing, etc. with you?” Your staff needs to know how to respond to this, providing reasonable reassurance, but without providing any guarantees of safety (remember: recreational activities all have inherent dangers that cannot be eliminated).
- Notify insurance carrier of incident; *i.e.*, put them on notification of potential claim/s
 - Read your policy, this may be required! – Know your obligations under your policy
- Consult with legal counsel Re-analyze and update risk management and Emergency Response Plan
- Evaluate and update insurance policy, if necessary
- Analyze what, if anything, needs to be improved
- List remedial actions with completion dates, consult with legal counsel with regard to implementing changes in operations (subsequent remedial measures)
- List additional training performed – specific individuals/ department manuals



(5) **Media Spokesperson** – Works to control release of information to media and to keep positive focus, as well as positive public image of company. Also works with other Agency PR departments in coordinating information released. (Media Spokesperson should be a senior executive, but not necessarily the most senior executive. This allows the spokesperson to defer questions he/she might not be ready to answer to be answered in a later statement by a more senior executive).

Exemplar duties/tasks/responsibilities of the Media Spokesperson :

- Activate Media Response Plan
 - Only designated Media Spokesperson can comment
 - Everybody else should know ahead of time who media spokesperson is for your company
 - Everyone else should be trained to say something to effect of: “I am unable to comment, [designated spokesperson] is the person you need to talk to”
 - Employees should know to *never* assume a conversation is off the record
 - Try and shelter guests from media
 - Politely recommend to guests to not talk to media (though, in reality, you cannot prevent it).
 - Recommend to guests to direct the media inquiries to the media spokesperson
- Notify all staff that Media Plan is in place – refer all calls to designated spokesperson
- Communicate with Family Relations Coordinator/Liason
 - The family should hear information and updates first!
 - As we all know, information from media is often distorted and may not be factually accurate
- You should also be in constant communication with Incident Commander
- Know that the media will be seeking information (and they may even send a crew to the scene for footage and to try and obtain information from people involved) – Your employees on scene should be prepared for this.
 - Media may include:
 - Print media, primarily local and national newspapers
 - Radio and TV stations, primarily local
 - National wire services
- While no one wants the media involved, the media can easily learn of an emergency situation, and, therefore, it may be preferable for your organization to affirmatively release information rather than appearing defensive
 - If you have to notify the media, the best time to do so is just before the situation will become visible through the involvement of law enforcement or search and rescue authorities.
 - Priority of media
 - High priority goes to the media group that has a positive relationship with the company from previous media contacts and that will definitely want to cover the story (Some companies invite news reporters on complimentary trips,

prior to any potential newsworthy accident, so the reporter will have firsthand knowledge of the activity, know that you run a good quality operation, and that you emphasize safety; *i.e.*, they are predisposed to having a favorable view of you even before tragedy strikes...you want to tip the scales in your favor).

- Low priority goes to those who may cover the story but will learn of it from other media
- BE PREPARED to talk to the media
- Follow certain guidelines when communicating with the media, for example:
 - Draft a press release with Incident Commander and, if applicable, legal counsel
 - Try to stick closely to this information and your prepared talking points.
 - Remember that you only get one chance to make a first impression
 - First impression is critical
 - Address interviewer/questioner by his/her first name, as it adds a personal approach, appears to align you with the questioner, and helps create an air of cooperation. It will help add to your credibility and establish your own likeability.
 - Your posture, tone, expression and demeanor call all say as much as your words. Don't slouch, mess with your hair, shred paper, tap your foot, repeatedly lick your lips, jingle keys or change in your pockets, rub your hands, frown constantly, shrug, shift side to side, or look down or away.
 - Provide timely, essential, accurate information
 - Never lie, intentionally misrepresent, or tell a deliberate untruth
 - Never make light of a tragedy
 - Also avoid nervous or stress laughter, as you don't want it misconstrued
 - Don't guess or speculate. If you don't know something, admit it. Explain that you are gathering additional information. Especially in the early stages of an emergency/crisis, you will not be expected to know everything
 - Establish ground rules at the outset. Schedule media briefings and then adhere to that schedule
 - Head-off the spread of rumors and inaccuracies. Put a "clamp" on all employees. Provide your employees with the same information that the media is getting, so that they are informed of the event and basic facts. Again, **NO ONE** speaks to the media but the media spokesperson. This also applies to other members of the crisis management team and company management
 - Speak with one voice!
 - Express confidence in those charged with managing the crisis
 - Reassure the public
 - Avoid strong opinions or inflammatory language.
 - Don't get rattled or let angry emotions get the better of you (be the model of cool in that regard)
 - Do, however, communicate care and compassion
 - Empathy is ok
 - Establish a phone number or numbers (landline and cell) where Media Spokesperson can be reached for info

- Maintain Spokesperson's constant access to media, otherwise they will begin speculating or looking for information elsewhere
- Return ALL phone calls to media
- Know that *nothing* is off the record.
 - If you don't want to see it on the news or in print, don't say it!
- Remain on your game at all times
 - The interview is not over until the reporter is leaves or hangs up the phone
 - Don't relax simply because the camera or tape recorder is shut off. Often this is a time for reporters to seemingly innocently probe for juicy tidbits and quotes, thinking your guard is down. Much to your and your company's chagrin, your off-the-cuff and/or inadvertent remark may end up quoted verbatim! This can cause real damage!
- It may be necessary to draft and issue a follow-up press release to update media
- Don't try to avoid the media. "No Comment" is not a sufficient answer to a question (*unless* its about pending litigation), it looks evasive
 - If information is not available, let the media know when it will be available
 - If you cannot release certain information yet, explain why certain information cannot be released (for example, "Next-of-Kin have not yet been notified...", "The Police/USFS/Parks Dept, etc. have asked us to hold off on releasing that information at that time. You will need to speak to them on that topic")
- Establish a designated area to be used for media briefings and interviews
- Verify all media credentials
- Where possible, record conversations with media – the facts and information provided
- Prepare, Prepare, Prepare!
 - Identify your three or four most important messages you wish to communicate. This is your first, and it may be your only, chance to give your version.
 - Be well-prepared for all briefings and interviews with media
 - Identify in advance the questions you anticipate will be asked
 - Develop answers to those questions, paying particular attention to the most difficult or sensitive subjects
 - Conduct a practice session in private, if time and circumstances allow
 - Be wary of verbal and behavioral ticks (practice helps identify and eliminate these)
- Provide baseline information first (who, what, where, when), then fill in the details as they become available
 - Provide the media with as much detail as reasonably possible in order to prevent a continuing series of headlines dragged out over a period of days or weeks
 - You want it to become "old news" as fast as possible
- What the media will want to know:
 - What/where/when incident happened
 - How many people were involved
 - Who was involved – including rescuers, staff, and participants, Ages, hometowns, and states of these people.

- Whether the relatives have been notified
 - What emergency response efforts have been made
 - Condition of the incident site and the equipment, training, and safety of the group
 - Background on the company, including training of staff and participants
- Begin and end your statements to the media with a compassionate statement communicating your company's care and concern for those involved in the crisis
 - Start with your conclusion.
 - Speak in "headlines". Keep it simple, short and tight.
 - Try and avoid the possibility of out of context sound bites.
 - Never repeat questions asked by an interviewer.
 - Don't focus on the problem & do not be the one to bring up the negative.
 - If a damaging issue or information surfaces, concede what you should to maintain credibility, but do so in the briefest way, then immediately shift gears to describe and focus on what positive steps are now underway to resolve the problem
 - Accentuate the positive!
 - Gently and unobtrusively impress upon the media any kind of humanitarian and/or thoughtful acts undertaken by the company
 - Do not overdue it.
 - Maintain eye contact and keep it
 - This is important for establishing credibility, especially during tough questioning
 - Eye contact conveys you believe what you are saying and not being evasive
 - Answer open-ended questions very briefly
 - When a question is too broad to answer briefly, don't try. Give a brief response and wait for a follow-up question. The more you ramble on, the less organized your response will appear and the greater chance you'll say something in an unintended manner.
 - Again, you can fall back on your press release and prepared talking points
 - Don't answer questions that aren't yours to answer
 - This is the basically the same caution as "don't speculate"
 - For example: Q. There have been reports of other XY&Z Rafting Manufacturer's equipment failure. Could XY&Z's defectively design and manufacture of this raft have caused these deaths? A. No one has assigned blame in this matter. Your question is asking me to speculate which I will not do. Right now, everyone's focus is on helping the family members deal with their loss and with ensuring the safety of our other guests. In the days and months to come, there will be a complete investigation into this accident.
 - Don't let an outrageous accusation or comment go unchallenged. It gains more credibility the longer you let it go before you refute it. Rebut it politely. Maintain your composure and don't engage in a debate.
 - However, it is ok to not answer "attacking questions" directly and to correct false statements and/or incorrect assumptions built into questions
 - For example: Q: Why weren't your guides properly trained to save this person's life? A. All of our guides are certified in Wilderness First Aid and

CPR, two of the guides on scene are certified First Responders and EMT's, and all of our safety training and requirements exceed federal/state and industry standards

- Control the Interview/You can control a TV interview
 - Try to avoid press conferences until you are ready
 - Remember nobody wants to watch boring news. TV stations/news reporters cannot and do not want to use boring bland tape. If the interview is taped, you can affect the final result.
 - For example, if the question is hostile, baited and/or loaded, you can repeat the same bland and even boring answer over and over. This way, it is unlikely that portion of the tape will be used in a short misleading sound bite segment.
 - If it is a live interview, you can force the interviewer off the hostile question in the same way. If you give them a simple answer, without appearing defensive, over and over, the reporter will be forced to move on.
 - Examples of bland answers: (1) I will not speculate; (2) I do not have that information at this time; (3) We will need to wait for the hard data on that; (4) It serves no useful purpose to rehash information that is X years old. We are looking forward and proactively.
 - Use your schedule to control press conferences and/or end bad interviews
 - Choose when you hold the conference or grant an interview. Set limits on your availability. Excuse yourself if things get really ugly and nasty, but don't look like you are running away. Just look at your watch, and say that you have to move on to your next appointment. Thank the interviewer, look them in the eye, shake their hand and, if you feel it is appropriate, tell them where they can submit additional written questions to you.
- Alternatively and/or, if necessary, prepare a press release
 - You should have a pre-written statement that allows you to simply insert the particular details.
 - Open with key facts – who, what, where, when – and then add details
 - Write in a way you would like to have it appear in print media
 - Method: Fax the press release to high priority media and then perhaps call media representatives you think might be sympathetic
- After consulting with your legal counsel, consider giving law enforcement and other agencies a copy of your prepared Press Release/s or some other prepared information so they too have something to work with when communicating with the media.
 - Law enforcement and other agencies usually have their own P.R. person
 - You should already know who these people are and have their direct contact information
 - To the extent possible, you want to work with them to ensure that you do not release conflicting information
 - You also want to maintain open lines of communication with them, as they may share information that you are not yet privy too. They may also give you a courtesy “heads-up” in the event that they intend to release information that might not be favorable to you; *i.e.*, they let you know so you can prepare to

respond, and so you can avoid surprise and being put on the spot. No one wants to be a deer in headlights!

- Additional things to avoid:
 - Never release any information that identifies responsibility for an accident without consulting legal counsel (and, if necessary, discuss with your insurance carrier)
 - Even then, carefully prepare it and do not make public an assessment of fault or criticism without a full explanation of the incident
 - Do not discuss matters currently being litigated; politely decline and state: “we do not comment on pending litigation”
 - Never reveal medical information prior to medical diagnosis or without the permission of the injured person or their family. You do not want to violate any privacy laws. You also do not want to anger the family.
 - Do not provide the names of injured parties or deceased prior to notification of emergency contact, family members and/or next-of-kin. Be sensitive. Put yourself in their shoes, and ask yourself if you would want to first learn of a loved one’s tragedy on the news at the same time millions of others hear about it.
 - Do not reveal estimates of property damage
 - Do not make representations about your company’s potential liability, what the company has paid in other lawsuits, if any, arising out of the same or similar circumstances, or what your company may be willing to pay here.
- Arrange for monitoring of news reporting – listen to news broadcasts and check newspapers
 - When a reporter prints or broadcasts erroneous information, inform the reporter, not his or her superior, and provide correct information as soon as possible.
 - Collect and review your on-camera interviews to see how you can improve your next one.
 - Employ a broadcast service, if necessary, to gather media accounts.
- Keep Incident Commander informed of media reporting and of any situations that may reflect adversely on the company

(6) Injured & Family Relations Coordinator/Liason Provide prompt and continuing information to, as well as maintaining a good relationship with, the injured's/deceased's family members. This is not only ethically the right thing to do, but it is also one that is more likely to convince the injured party and/or their family not to bring a claim in the future.

Exemplar duties/tasks/responsibilities of the Family Relations Coordinator/Liason:

- Gather accurate information facts from and coordinate with Incident Commander and other incident leadership positions
- Obtain emergency contact information/family/ next-of-kin contact information
- Accompany injured guests to the ER if necessary
- Be the first one to make the call
 - Always try to avoid having a sheriff or search & rescue person making the call
 - Promptness is important – don't delay calling even if all the details are not yet known. Once the sheriff or search and rescue radios are talking about an incident, the news media are not far behind.
- Be conscious of the timing of the call and try to think through where the recipient might be: at work, home, vacation, *etc.*
 - Consider the option of speaking to all emergency contacts, family and/or next-of-kin listed at the same time, perhaps through a conference call.
 - Think through what to do if the identified emergency contact or next-of-kin is not available or if someone else answers the phone.
- Think through what to say before making any contact.
- Sensitivity to the feelings of the injured and his/her family is the foremost consideration.
- Convey personal thoughts and condolences without admitting liability
 - Empathy is ok!
- Have facts organized and accurate
 - Be ready to give the factual details (who, what, where, when but do not discuss "why", as why the incident occurred involved assessing fault)
 - Reserve stating opinions as to cause or who is at fault
 - They have a right to all factual information pertaining to the incident, but don't necessarily plan on conveying all details in that first call. Additional information can come in subsequent calls (Do not overwhelm them. Remember you just told them their loved one is hurt, missing or dead).
 - If you do not have all the details, give them the info you have and explain that you are gathering additional facts
 - Try to anticipate possible questions and responses and prepare accordingly
- Know and be able to provide directions to the hospital
- Discuss when and how the family can talk to or be with the injured party.

- Consider whether it is appropriate or necessary for you to pay some or all expenses associated with uniting family members and injured party
- Accompany injured guests and/or family members to the ER if necessary
- Make sure injured, as well as their emergency contact/family/next-of-kin know how to reach you at all times (work, cell, home, and info of another person who can promptly track you down for them), and always take their calls.
- Asking what support injured needs immediately and help obtain this support if appropriate.
- Keep notes of all information (including date, time, location, and other pertinent data) conveyed to you from injured, family or other parties (if it is a face-to-face conversation, write it down immediately after when you are alone).
- Be prepared to talk to other participants and/or their family members (factually) about the incident. Think about what you can say while maintaining the injured party's confidentiality.
- Do not agree to provide any written documents until you have consulted with your attorney. Oftentimes you can provide the initial documentation (frequently this is the incident report) but you should only do so upon the advice of counsel.
- Do not make offers to refund money or pay compensation until you know what, if anything, the party wants.
 - Such offers are often premature
 - They are sometimes viewed by the party as you trying to buy yourself out of trouble early (and they start to think, whether incorrectly or not, that they may be entitled to more)
 - People tend to view early offers as an implicit or tacit admission of liability
 - Even though you think it might be a fair offer, without a frame of reference, it could be excessive or viewed as insulting.
 - Always consult with your attorney and insurance carrier before making any offer.
- If the injured party, another participant, family member, *etc.*, contacts you seeking a refund or other compensation, ask them specifically what they want and why they feel entitled to a refund or payment, and tell them you will get back to them within a prescribed time (and do so).
 - Obtaining their explanation from them helps that person feel “heard”, and it will also help you, your legal counsel and your insurance carrier in evaluating potential liability.
 - Next, investigate the facts to evaluate the person's assertions, and then consider potential resolutions/response
 - Talk to company management to determine whether you are required to report the claim to your insurance carrier and whether you need the insurer's input before making any settlement offer.
 - Discuss the matter with legal counsel
 - Contact the person with your response and succinct reasoning
- Provide ongoing communication with emergency contact/family/next-of-kin (may involve several weeks, months and sometimes even years of ongoing contact)

- Too often, the injured, family, *etc.*, are and/or feel forgotten by the company after a few weeks, even though they are still coping. A little humanity, even if it is a 2-minute phone call every couple weeks, goes a long way to showing you care.
- Put reminders to call in your calendar – don't blow it off
- Tell the party before ending the call that you will be calling to check in every few weeks
- Consider sending a card or flowers, if appropriate
- Ongoing communications are not only for humanistic purposes, but they also help to determine whether party intends to make a claim, whether resolution is possible and to gather potentially useful information if a claim or lawsuit ensues.
- "Food For Thought" - Some things to consider for ongoing communications
 - Call rather than write a letter – its more personal and won't come off as "canned"
 - Tell the person that you are sorry that he/she, *etc.*, was injured while participating in your program/activity. Be careful not to say "I'm sorry we injured you" or words to that effect... just that "you are sorry they were injured". It is ok to use the words "I'm sorry" in this way, as such words have a magical effect and do not necessarily mean that you think the incident or injury was your fault. Some states even have a protective statute with respect to such statements.
 - Ask how the person is doing
 - Ask about his/her current health and status
 - This question shows you care, and it helps you obtain info as to nature and extent of the injury
 - It also helps you project what, if any, damages claims he/she might bring
 - Explain that your company cares about its participants and that it wants them to have positive experiences
 - Ask what you can do to help the injured person
 - This too shows you care and that you are supportive
 - It lets you know what they want
 - Remember, you don't have to agree to it, nor does it mean you have to give them everything they want. However, it conveys that you are at least willing to consider their position
 - Again, always consult with management, your attorney and, where appropriate, your insurance carrier before offering anything or making counteroffers.
 - Consider having a staff member who has firsthand knowledge of the accident make a follow-up call. However, this should only be done with your assistance, and perhaps that of legal counsel
 - Be advised that guides sometimes get named personally in lawsuits. They need to know this and be extremely cautious about statements/admission they make to the injured or other parties.
 - Depending on the circumstances, consider arranging for others (company board members, other staff who know the family, *etc.*) to reinforce your communication
 - Avoid conflicting messages.
- If the party indicates that he/she has an attorney OR if you are contacted by an attorney:

- You will need to contact your own legal counsel, and most likely your insurance carrier
- Once the party informs you that they have legal counsel, you may NOT contact the party directly. You will need to work through his/her counsel from that point forward
- Tell the party that you will have your attorney (even if you don't yet know who your attorney will be), and get his/her attorney's contact information
- Ask the party to have their attorney, from here on out, to only deal with your attorney, and to not contact you directly (the same rules about *ex parte* communications apply to them too)
- Do not discuss any substantive issues
- Do not agree to provide any further information or documentation unless or until your attorney makes that decision
- Do not let on or appear alarmed or worried that the party has an attorney
 - In fact, sometimes a claimant's attorney may help the claimant put the matter into perspective, especially if it is a frivolous claim in law and/or fact, and that attorney may actually help deter the party from pursuing a formal claim. An attorney can also look at the matter objectively, and can remove the emotion from potential settlement discussions/considerations.

C. Addition Preparation

Have emergency contact information and additional resources pre-compiled and in an easy-to-find location and easy-to-use format. Some exemplar forms are attached.





CRISIS CONTACT FORM- MASTER COPY

CORE CRISIS TEAM

INCIDENT COMMANDER

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

TRIP LEADER/ ON-SCENE MANAGER

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ACCIDENT INVESTIGATION COORDINATOR

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

LOGISTICS COORDINATOR

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

MEDIA SPOKESPERSON

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

INJURED AND FAMILY RELATIONS COORDINATOR/LIASON

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE/BACKUP CRISIS TEAM MEMBERS

ALTERNATE INCIDENT COMMANDER

Office telephone _____
Home phone _____

Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE TRIP LEADER/ ON-SCENE MANAGER

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE ACCIDENT INVESTIGATION COORDINATOR

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____
Email _____
Fax _____
Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE LOGISTICS COORDINATOR

Office telephone _____
Home phone _____
Home address _____
Cell phone _____
Car phone _____
Pager _____

Email _____

Fax _____

Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE MEDIA SPOKESPERSON

Office telephone _____

Home phone _____

Home address _____

Cell phone _____

Car phone _____

Pager _____

Email _____

Fax _____

Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

ALTERNATE INJURED AND FAMILY RELATIONS COORDINATOR/LIASON

Office telephone _____

Home phone _____

Home address _____

Cell phone _____

Car phone _____

Pager _____

Email _____

Fax _____

Alternate family or other emergency number _____

NOTIFIED? (time/date/initials of notifier/means of notification)

EXTERNAL NOTIFICATION FORM--MASTER

EMERGENCY CONTACTS

A. Fire/EMT Department

Contact:

Telephone _____

Fax _____

Radio frequency _____

B. Police Department

-Local

Contact:

Telephone _____

Fax _____

Radio frequency _____

-State

Contact:

Telephone _____

Fax _____

Radio frequency _____

C. Highway department/Public works

-Local

Contact:

Telephone _____

Fax _____

Radio frequency _____

-State

Contact:

Telephone _____

Fax _____

Radio frequency _____

D. Neighbors (homes/businesses possibly evacuated in case of emergency)

Contact:

Address _____

Home phone _____

Work phone _____

Cell phone _____

Contact:

Address _____

Home phone _____

Work phone _____

Cell phone _____

Contact:

Address _____

Home phone _____

Work phone _____

Cell phone _____

E. Red Cross and other shelter/aid providers

Contact:

Telephone _____

Fax _____

Cell _____

F. Federal and state emergency management offices

Contact:

Telephone _____

Fax _____

Cell _____

G. State forest or environmental officials

Contact:

Telephone _____

Fax _____

Cell _____

H. Federal forest or environmental officials

Contact:

Telephone _____

Fax _____

Cell _____

I. Search and rescue groups

Contact:

Telephone _____

Fax _____

Cell _____

J. Local and regional hospitals/trauma centers

Contact:

Telephone _____

Fax _____

Cell _____

K. Local and regional airports/heliports

Contact:

Telephone _____

Fax _____

Cell _____

L. Other Local and Recreational Activity Companies

Contact:

Telephone _____

Fax _____

Cell _____

Contact:

Telephone _____

Fax _____

Cell _____

Contact:

Telephone _____

Fax _____

Cell _____

Corporate Contacts

A. Corporate headquarters

President:

Telephone _____

Private line _____

Fax _____

Cell phone _____

Home phone _____

Email _____

Executive assistant to president:

Telephone _____

Private line _____

Fax _____

Cell phone _____

Home phone _____

Email _____

Chief Operating Officer

Telephone _____

Private line _____

Fax _____

Cell phone _____

Home phone _____

Email _____

B. Outside public relations counsel

Telephone _____

Private line _____

Fax _____

Cell phone _____

Home phone _____

Email _____

C. Local/regional trade association

President:

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

Public relations director:

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

D. National trade association

President:

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

Public relations director

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

E. Attorney

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

F. Insurance

--Liability

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

-Property

Telephone _____
Private line _____
Fax _____
Cell phone _____
Home phone _____
Email _____

BRAINSTORM: What other outside corporate or company-related entities does your resort associate with that might be helpful during a crisis?

GENERIC INITIAL PRESS RELEASE TEMPLATE – ADJUST AS NECESSARY

FOR IMMEDIATE RELEASE

Media Contacts: (insert Spokesperson info)

(BUSINESS NAME) REPORTS INCIDENT

(LOCATION) – (DATE) – A (AGE) year-old (GENDER) from (STATE OF ORIGIN) was injured today while participating in a (INSERT ACTIVITY) on the/at the SPECIFIC LOCATION. (FACTUALLY DESCRIBE INCIDENT).

On scene personnel undertook immediate action, rescue efforts and response. The **(BUSINESS) STAFF AND EMERGENCY PERSONNEL (you can also identify the emergency personnel by entity name)** were also contacted and responded immediately.

EMERGENCY PERSONNEL provided medical care and the gentleman/woman was transported the patient to an/the **(AWAITING AMBULANCE, HELICOPTER)**. **(HE/SHE)** was then transported to the **(NAME OF MEDICAL FACILITY)**, where **(HE/SHE)** is currently undergoing/received further treatment.

The family has been contacted, and all of us at **(NAME OF BUSINESS)** send our sincerest thoughts and well-wishes to everyone involved.

###

For additional information on this and all incidents after transfer from **(BUSINESS)**, members of the media must contact the appropriate medical facility.

GENERIC INITIAL PRESS RELEASE TEMPLATE – ADJUST AS NECESSARY

FOR IMMEDIATE RELEASE

Media Contacts: (insert Spokesperson info)

(BUSINESS NAME) REPORTS FATALITY

(LOCATION) – (DATE) – A (AGE) year-old (GENDER) from (STATE OF ORIGIN) was pronounced dead at the (NAME OF MEDICAL FACILITY) today after (FACTUALLY DESCRIBE INCIDENT) on the/at the SPECIFIC LOCATION. (More factual details about incident if appropriate)

On scene personnel undertook immediate action, rescue efforts and response. The **(BUSINESS) STAFF AND EMERGENCY PERSONNEL (you can also identify the emergency personnel by entity name)** were also contacted and responded immediately.

EMERGENCY PERSONNEL provided **(BASIC/ADVANCED)** life support and transported the patient to an/the **(AWAITING AMBULANCE, HELICOPTER, NAME OF MEDICAL FACILITY)**. **(HE/SHE)** was then transported to the **(NAME OF MEDICAL FACILITY)**, where **(HE/SHE)** was pronounced dead.

All of us at **(NAME OF BUSINESS)** extend our deepest sympathy and support to the family and friends involved.

###

For additional information on this and all incidents after transfer from **(BUSINESS)**, members of the media must contact the appropriate medical facility.

INCIDENT REPORT

PLEASE PRINT IN INK!

DATE OF INCIDENT: _____ **TIME OF INCIDENT:** _____

NAME OF INJURED: _____ **MALE/FEMALE AGE:** _____

PERMANENT ADDRESS: _____

_____ **PHONE: (____)** _____

LOCAL ADDRESS: _____ **PHONE: (____)** _____

LOCATION OF INCIDENT: (PLEASE BE DETAILED & ACCURATE) _____

TYPE OF INCIDENT: _____

OF PARTICIPANTS: _____

WEATHER CONDITIONS: _____

TERRAIN CONDITIONS AT THE SCENE: _____

DESCRIBE HOW INCIDENT HAPPENED OR HOW IT WAS DESCRIBED TO YOU:

GIVE DETAILED INFORMATION REGARDING THE LOCATION OF THE INCIDENT:

DESCRIBE THE COMPLAINT OR INJURY (IF ANY): _____

“QUOTE” ANY STATEMENTS MADE BY THE PARTIES: _____

WAS EMS CALLED: CALLED? YES / NO IF YES, BY WHOM? _____

WAS INJURED PARTY EVALUATED BY EMS?

YES / NO

PRINT YOUR NAME: _____ **DATE:** _____

LOCAL ADDRESS: _____ **PHONE:** _____

YOUR SIGNATURE: _____ **DATE:** _____

SUPERVISOR'S SIGNATURE: _____ **DATE:** _____

***WHEN COMPLETE, TURN INTO YOUR SUPERVISOR FOR REVIEW**

DID YOU REMEMBER TO:

- 1) ATTACH THE PARTICIPANT LIST?
- 2) ATTACH THE RELEASE IF A MINOR?
- 3) COMPLETE THE ENTIRE FORM, INCLUDING YOUR NAME?

RETURN COMPLETED FORM TO RISK MANAGEMENT

INCIDENT REPORT FORM SAMPLE

Company Name

Activity

Address

Person
completing
Report

Injured Party

Name

Address

Date of Birth (00/00/00)

Incident

Objective description of incident

Injury/First Aid

Injury, Signs and Symptoms

Witness	Witness
Name	Name
Address	Address

- | |
|--|
| Incident Investigation Packet:
Witness statements
Photographs of incident site
Diagram of incident site
Notify _____ serious injury or fatality
Notify Workers Compensation—employee only |
|--|

SAFETY AND RISK MANAGEMENT RESOURCES

Risk Management

1. Federal Emergency Management Administration (FEMA), www.fema.gov
 - a) *Emergency Management Guide for Business and Industry*, www.fema.gov/library/bizindex.shtm
A step-by-step approach to emergency planning, response and recovery for companies of all sizes.
 - b) *Business Recovery Checklist*, www.fema.gov/ofm/bc.shtm
Provides a means of creating a Business Recovery manual in the event of a natural or man-made disaster that impacts your business.
 - c) FEMA's Emergency Management Institute (EMI), www.training.fema.gov/emiweb/PDS
EMI provides a nationwide training program of more than forty self-paced, independent study courses for those who have emergency management responsibilities. Courses are offered free-of-charge.
2. Risk and Insurance Management Society, Inc. (RIMS), www.rims.org
RIMS is a not-for-profit organization founded in 1950 that serves 8,400 risk management professionals around the world.
3. Risk and Insurance, www.riskandinsurance.com
Providing current information on a wide variety of business risks and mitigation strategies – from insurance, employee benefits and alternative risk transfer to emerging risks and the strategies.
4. International Risk Management Institute, www.irmi.com
Providing up-to-date, objective and practical strategies and tactics to help in a changing insurance and risk management environment.

Workplace Safety

1. Occupational Safety and Health Administration (OSHA), www.osha.gov
 - a) OSHA Publications and Posters Online, www.osha.gov/pls/publications/pubindex.list
 - b) OSHA eTools, www.osha.gov/dts/osta/oshasoft/eTools
eTools are “stand-alone,” interactive, Web-based training tools on occupational safety and health topics. Many presentations can be downloaded.

- c) OSHA General Industry Trainer Powerpoint Presentations, www.osha.gov/fso/ote/training/outreach/gi_outreach_tp.html
 - d) OSHA Construction Industry Trainer Powerpoint Presentations, www.osha.gov/fso/ote/training/outreach/constr_outreach_tp.html
 - e) Self Inspection Safety Checklists, www.osha.gov/SLTC/smallbusiness/chklist.html
 - f) Consultation: Free, Confidential On-Site Safety and Health Services, www.osha.gov/desp/smallbusiness/consult.html
2. American Society of Safety Engineers (ASSE), www.asse.org
Founded in 1911, ASSE is the oldest and largest professional safety organization having over 30,000 members.
 3. National Safety Council, www.nsc.org
 4. ChemFinder.com, www.chemfinder.com
Provides free on-line searches of chemicals.
 5. Occupational Health and Safety, www.ohsonline.com
 - a) Occupational Health and Safety E-News, www.ohsonline.com/enews.html
Free e-mail newsletter.
 6. Compliance Magazine, www.compliancemag.com
 - a) Complimentary Magazine Subscription, www.compliancemag.com/subscribe.asp
 - b) Compliance Magazine's Regs and Resources Website, www.complianceregs.com
provides online resource for safety regulatory information. Offers a quick way to track government regulations that apply to workplace safety programs with downloadable checklists and forms.

Worker's Compensation

1. The Worker's Comp. Service Center, www.workerscompensation.com
The National website providing workers compensation news and information, a research center, info on your state's program, etc.
2. Workers Compensation Research Institute, www.werinet.org
An independent, not-for-profit research organization providing high-quality, objective information about public policy issues involving workers' compensation systems.

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-
3. The Center for Workers Compensation Training, <http://www.wctraining.com/>