



Educational Travel Consortium
At the crossroads of lifelong learning and travel

RISK MANAGEMENT

Comprehensive Travel Risk Management System Workbook: Plan, Prepare, Put into Action



Supporters and Contributors



GLOBAL *+rescue*

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Name: _____

Introduction

The goal of this workbook and session is to facilitate the development of your individual work plan that will be your guide to improve your current or create a new Comprehensive Travel Risk Management System. These systems are unique to each organization and company that depends on many factors such as the organization's mission, location and type activities, number of support staff and client days, resources, etc. The end goal is to have a system that is comprehensive and well-documented. Using this workbook and session together, we hope to help you reach that goal.

This session is broken into two components with roughly half of the time allocated to each. The first component will be short presentations covering some important topics with more details described below. The second component will be small group discussions with time allocated with each of the presenters.

The first section of the workbook is divided into 5 categories and is done this way so that it can be organized easily into a system for presentation and discussion. Many of the risk management system components of this organizational method cross categories as it would with any other methodology. The key is to identify and act on all of the components relevant to your organization or company.

Each presenter will cover one category and address some of the important topics in it. The next section of the workbook will be for you to take note of questions for that presenter that you will be able to ask during the second half of the session.

The third section of the workbook is for you to develop action items organized into a work plan with priorities. You may also identify others during other sessions or discussions throughout the conference.

The fourth section is contact information for additional resources that can help you develop your comprehensive system or others you may need to contact for more help after a significant incident. The final section includes sample forms as an additional resource.

Risk Management System Components

I. Insurance, Legal Issues and Documents

- Duty of Care
- Insurance Types and Issues
- Laws, Case Law, Industry Standards/Practices, Organization's own Guidance
- Minors
- Third Party Contracting
- Volunteers
- Waivers
- Other Documents/Agreements

II. Screening and Communications

- Medical Forms
- Pre-trip Communications
- Post-trip Communications
- Screening
- Special Needs Accommodation
- Trip Marketing

III. Program Development and Training

- Equipment Maintenance and Quality Assessment
- Guide or Leader Hiring
- Itinerary Planning
- Performance and Accountability
- Periodic Policy Review
- Supplier Selection
- Training Certifications and Requirements

IV. Safety Systems

- Communication/Signaling Devices
- First Aid Kits
- Global Risks or Destination Threats
- Location Security Reports
- Medical Facility Assessments
- On-Call Systems
- Risk Audits and Assessments
- Safety Management Plans
- Transportation Safety
- Watercraft Safety
- Water Treatment

V. Incident Response and Management

- Emergency Response Plan
- Incident Investigations
- Incident Reporting
- Incident Response Training
- Media and Communication Plan
- Medical and Security Assistance
- Organizational Crisis Management

Questions

Use this section to list questions you have for each of the presenters during the round table discussions that will help you create a work plan to develop, enhance or refine your Comprehensive Travel Risk Management System.

I. Insurance, Legal Issues and Documents

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II. Screening and Communications

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III. Program Development and Training

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-
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IV. Safety Systems

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V. Incident Response and Management

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Work Plan

Use this section to prioritize your actions or steps you will take to develop, enhance or refine your Comprehensive Travel Risk Management System.

I. Insurance, Legal Issues and Documents

- 1.
- 2.
- 3.
- 4.

II. Screening and Communications

- 1.
- 2.
- 3.
- 4.

III. Program Development and Training

- 1.
- 2.
- 3.
- 4.

IV. Safety Systems

- 1.
- 2.
- 3.
- 4.

V. Incident Response and Management

- 1.
- 2.
- 3.
- 4.

Resources: Contact Information

Legal Counsel Resources, Issues and Documents

Catherine Hansen-Stamp	reclaw@hansenstampattorney.com	303-232-7049	Consults on law, liability and risk management issues with those who provide sport, recreation, adventure and experiential services to the public.
Laurie Sherwood	lsherwood@wfbm.com	415-781-7072	Focuses on legal and liability issues, including risk management, related to travel, tourism, and hospitality; also consults on employment issues and litigation.
Rod Gould	rgould@smithduggan.com	617.228.4443	Concentrates in travel and tour operator law, recreation law and commercial litigation
Charles (“Reb”) Gregg	www.rebgregg.com	713-982-8415	He is an attorney, lecturer and writer in legal issues for adventure, education and recreation based outdoor programs.

Safety Systems

Tony Rango	tony.rango@sierraclub.org	415-977-5524	Directs Sierra Club’s National Outdoor Adventure Program and program safety for the Club as well.
Global Rescue	www.globalrescue.com	800-381-9754	Provides the health, safety and travel risk management services to individuals and enterprises.
Bill Frederick	www.lodestonesafety.com		He is a risk management consultant in the outdoor industry and focused on organizations conducting international travel. His company name is Lodestone Safety International.
Steve Smith	www.outdoorrisk.com		He is an independent risk management consultant for programs providing outdoor, adventure and experiential programming. His company’s name is Experiential Consulting, LLC.
Overseas Advisory Council	www.osac.gov		State Department service designed for educational travel security.

Incident Response and Management

Todd Duncan	todd.duncan@sierraclub.org	415-977-5524	Serves as the Sierra Club's Program Safety Manager working across all activities to address risk.
Global Rescue	www.globalrescue.com	800-381-9754	Provides the health, safety and travel risk management services to individuals and enterprises.
Wilderness Risk Management Conference (WRMC)	www.nols.edu/en/courses/risk-services/wilderness-risk-management-conference	800-710-6657	The core objective of the WRMC is to offer an outstanding educational experience to help you mitigate the risks inherent in exploring, working and recreating in wild places.
Chris Lamar Page Turner	set up advance relationship, will coordinate through Todd Duncan	720-280-7793	They offer Psychotherapy Counseling Services for families, adults and youth, willing to do phone sessions for behavioral and mental health crisis, and diagnosis.
Outdoor Safety Institute	www.outdoorsafetyinstitute.com	406-551-6489	OSI provides support on safety and liability topics for outdoor education, recreation and related organizations.

Resources: Sample Forms, Articles and Other Materials

- Americans with Disability Act Revisited - Article
- Communication Tips: Internal and External - Handout
- Contracting with Outside Organizations - Powerpoint
- Contracting with Outside Organizations - Handout
- Fundamental Legal Issues - Powerpoint
- Sierra Club's Detailed Incident Information Collection Form
- Sierra Club's Incident Report Form
- Sierra Club's Liability Waiver (revised 2017)
- Sierra Club's Medical Form
- Sierra Club's Safety Management Plan Form
- Tripping and Travel Camps - Article
- Two Silos and a Crosswalk - Powerpoint
- Use of Participant Agreements - Releases and Related Issues - Powerpoint
- Volunteer Legal Issues - Powerpoint
- Working with Minors: Legal Issues - Powerpoint