Crisis planning and prevention

PLANNING PROCESS GUIDE

This guide addresses how to plan for the unexpected and why it is critical to do so. It identifies who to involve in the planning process, how to select your crisis management team, and what the responsibilities are for that team. It also describes seven elements of a good crisis management plan and concludes with how to select an external consultant if needed.

The material in this guide was taken with permission from the document, Crisis management and response planning guide for school administrators, written by Carol A. Cepress, M.A., CEAP. Ms. Cepress is the founder and principal of Cepress & Associates, a consulting firm providing training and consulting services to improve organizational effectiveness. Primary services include crisis management planning and response, violence prevention and response, change and transition management, and employee assistance program consultation and training.

Note: The crisis planning and prevention guide begins on the next page.
Learning objectives
After reading this section you will be able to:

- Defend the Importance of planning
- Identify Unexpected events for which to Plan
- Describe the Crisis prevention planning process
- Identify Who to involve in crisis planning
- Select your Crisis management team
- Identify the Responsibilities of the crisis management team
- List Seven elements of the crisis management plan
- Select an External consultant
- Define the Role of an external consultant
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The importance of planning

We all are familiar with planning. Perhaps it’s a savings plan--money we plan to save for a vacation, a new automobile, a house, etc. In the business arena, planning is a must. Owners engage in planning to ensure the financial stability and health of the overall organization. Businesses complete both short-term and long-range strategic planning to ensure that their products and services remain viable. We all engage in planning. But why is it so important to plan?

The answer is that planning is a critical component in ensuring the success of most organization and business operations.

Planning for unexpected or unusual incidents is also a sound practice. Many organizations are unprepared to handle workplace crises, operating under the myth of "those things won't happen here." While most of us do not like to think about crises or traumatic incidents happening to us, planning to deal with them effectively is a key administrative responsibility. Experts agree that organizations that are proactive in this area maybe able to protect lives, prevent damage and destruction to organization property, and save hundreds of thousands of dollars by reducing the likelihood of lawsuits and diminished or lost performance and productivity.

Businesses and organizations are not immune to crises. When an organization crisis occurs, you need to act immediately and correctly. You need to know what to do and when to do it. You need to know who to notify and who to have involved. These additional people also need to understand their role and what they are expected to do. Everyone needs to work together as a team.

The time to plan for crisis management and response is not when a serious incident occurs, but long before, when conditions are normal. Many organizations have learned this lesson the hard way---they did not have a plan in place and muddled their way through when the crisis occurred, often making mistakes. Unfortunately, those mistakes were not only costly, but in some cases, fatal.

Although traumatic events cannot be completely prevented, the impact on the organization and its staff can be minimized. Implementing a crisis management plan in your organization will prepare you to handle a crisis when one occurs. If you already have a crisis management plan in effect, this guide can serve as a thorough review of your existing plan.

Before outlining the steps involved in crisis management planning, it is important to review the types of traumatic events for which to plan.

Unexpected events for which to plan

It is important to understand the types of incidents for which you need to plan. The chart below addresses some of these unexpected events:

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<th>Natural disasters</th>
<th>Organization traumas</th>
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<td>• Illnesses and death</td>
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<td>• Earthquakes</td>
<td>• Industrial accidents</td>
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<td>• Severe storms</td>
<td>• Acts of vandalism</td>
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<td>• Lightning strikes</td>
<td>• Plant explosions</td>
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<th>Acts of violence</th>
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<td>• Suicide</td>
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<td>• Sexual assault</td>
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<td>• Homicide</td>
<td>• Chemical spills</td>
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<td>• Threats/bomb threats</td>
<td>• Transportation accidents</td>
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Crisis planning and prevention

- Robbery/theft
- Physical assault
- Kidnapping

Health problems
- Heart attacks
- Strokes/seizures
- Loss of consciousness
- Communicable diseases

Multiple fatalities
- Workplace violence

Organizational
- Layoffs/department cuts
- Death of key personnel
- Criminal indictments

The crisis prevention planning process

Crisis prevention planning involves four steps: Step 1. Assemble your crisis management planning team, Step 2. Conduct an organizational assessment or audit, Step 3. Select your core crisis management team, and Step 4. Create your comprehensive crisis management plan. Each of these steps is described in more detail below.

Step one: assemble your crisis management planning team

The first step in the crisis management planning process is to determine who to include in this process. The planning process works best when the areas of responsibility affected by a crisis are involved in the development of the plan. Since this is determined only post-crisis, your planning team should include a variety of discipline areas. The roles/titles of those involved may vary slightly depending upon your organization setting and staffing. In general, the key functions that should be involved include the following:

- President
- Vice Presidents
- Director of Safety/ Security and Facilities
- Public/Media Relations
- Human Resource managers
- External Crisis Management Consultant or EAP Consultant
- Risk Manager
- Director of Finance
- Union Representative
- Legal Advisors
- Others: e.g., you may want to involve a county emergency services agencies, police and fire service representatives.

Compiling a cross-functional team with representatives from a variety of disciplines as suggested above, is beneficial. Tasking members to represent their discipline ensures that various perspectives will be addressed and limits group think.

Step two: conduct an organizational assessment

Organizations sometimes make the mistake of deciding that they will establish a program or policy without first considering specifically what they should do. The prevention planning process requires an organizational assessment--or audit-- to not only determine your organization's strengths, but to also identify risk factors and hazards which need to be addressed.
Steps involved in this type of assessment include:

- Conduct an opinion survey to learn about employee problems and concerns.
- Evaluate existing programs, policies, and personnel.
- Review any past crises.
- Evaluate safety and security policies and procedures to ensure appropriate protection for employees and customers.
- Audit communications capability in the event of emergency and crisis.
- Review existing crisis plan/Develop crisis plan. Ensure that the plan is a comprehensive crisis management plan, inclusive of policy and procedures for dealing with acts of violence.

In assessing your organization, you might wish to consult an external consultant who has experience in working with workplace violence prevention as well as with crisis intervention and response efforts. This professional can also assist you with the selection and training of your crisis management team. (See “How to select an external consultant”, page 9).

### Step three: select your crisis management team

When an organization trauma or critical incident occurs, your core crisis management team should be mobilized immediately to put your plan into effect and determine what steps to take. Never attempt to manage these situations single-handedly; a team approach is a necessity.

In selecting the members of your Crisis Management Team you will want to draw from the people who are already involved in the planning process. An organized Cross-functional representative team works best. An organized cross-functional team will be able to effectively respond to organization emergencies and crises. The size of your team will depend upon the size of your organization and its staff functions. Smaller organizations' teams may consist of only 2 - 3 core staff simply because a number of functions or responsibilities are shared. Larger organizations may have larger teams.

The roles/titles of those selected many vary, depending upon your organization setting and staffing. In general, select members of your core team from the following functions:

- President
- Vice Presidents
- Director of Safety or Security
- Director of Facilities
- A Crisis Management Professional - either internal or external
- Legal Advisor
- Public Relations Personnel
- Risk Manager
- Department Heads

### Responsibilities of the crisis management team

When a crisis has occurred, the team plays a crucial role in deciding how to best respond to the impacted staff and customer. This team will need to:

- **Establish** a command post which will be the focus of activity for the crisis management team
- **Identify** which employees have been affected. Further identify any individuals who may be at risk for a severe reaction
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- **Decide** on what services will be provided for families and the organization community
- **Determine** communication process and information flow for employees and customers, in the organization
- **Decide** how to inform people about counseling, debriefing sessions, and other services that may be offered
- **Organize** group sessions for all those affected by the incident. Utilize consulting professionals to conduct the debriefing sessions
- **Provide** crisis counseling for staff/employees that experienced the trauma
- **Arrange** for post-incident follow-up within a few weeks

**Step four: create your comprehensive crisis management plan**

After finalizing the selection of your crisis management team and completing your organization community's needs assessment/audit, the next step is to assemble this team and begin to work together to create a comprehensive crisis management plan. There are seven elements that should be included in your plan.

**Seven elements of the crisis management plan**

1. **Policy:** Your organization's position on the handling and documentation of crises.
2. **Procedures:** Description of how crises will be handled, with specific actions clearly outlined.
3. **Role definitions:** Assignments of who does what, where, and when during a crisis.
4. **Communication plan:** Describes how to notify employees and families of a crisis situation.
5. **Public relations plan:** Guidelines on what information will be disclosed, and to whom. Includes name and function of the individual who will serve as spokesperson to the media.
6. **Professional resources:** Internal and external professional resources available to assist before, during, and after a crisis.
7. **Physical plan:** How the organization will handle such issues as setting up the crisis management staging area to work from and the repair and replacement of and facility repair and restoration, etc.

**Acquiring external professional help**

Outside assistance is invaluable when you need trauma-related services. Trained and experienced professionals can provide critical information as well as offer significant emotional support for those who need it. Support services are a crucial part of the intervention process.

Professional resources include consultants and practitioners in the area of workplace trauma, threats, and violence prevention; employee assistance programs (EAPs); mental health professionals; and public relations consultants. Your insurance agent is another source of helpful information. In some situations, you may also need legal advisors. If such a resource is not available internally, you may want to investigate firms which specialize in this area.

**Investigate various services before you need to use them.**

**How to select an external consultant**

Although many organizations do maintain an on-going relationship with an external consultant or EAP, not all do. If you do not have the internal resources, and have not yet established the external resources, here are criteria to consider in selecting a Consultant:

- Consultant **specializes** in crisis management and trauma intervention. (Many consultants provide some services in crisis counseling and crisis response, but it is not their specialty)
- Consultant has masters degree in mental health counseling, psychology, social work, counseling education, psychiatric nursing, or directly-related discipline
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- Consultant is currently certified/licensed in the area of psychology, EAP, social work, etc.
- Consultant can provide you with examples of crisis management and response services he/she has delivered in the past, or is currently providing
- Consultant provides you with several professional references
- Consultant has the available time to respond to your organization’s crisis program needs

Role of the external consultant
Experts who are trained and experienced in the specifics of crisis management and trauma response can provide very helpful guidance and direction as you develop and maintain your crisis management plan.

These professionals will also provide the necessary training for your crisis management team. Additionally, external consultants are valuable resources because their role is to:
- approach the situation from an objective, third-party perspective
- assess the problem with you
- provide support to you and your team in making decisions
- determine whether or not intervention is needed
- identify what action steps the situation calls for if intervention is called for
- determine what additional resources or services are required
- provide personal support to you or other team members
- conduct debriefings as situation requires

There are a number of advantages to having a contractual relationship with an external consultant. The obvious advantage is that you can ask advice before the situation becomes more serious. Another advantage is that the consultant serves as a resource to you in helping to maintain your leadership role in this area.

Conclusion
Although each crisis situation will be different, having a plan and utilizing that plan may help you and your organization to protect lives, prevent and/or minimize damage and destruction to property, and provide the necessary support services and resources to those affected by the incident.

Remember these steps
- Follow the plan you have put into place
- Rely on the trained internal and external support you have readied to provide the expertise you need
- Monitor the situation until completed or resolved
- Review the process to determine where improvements can be made

Note: Sample crisis checklists and telephone trees begin on the next page.
Sample crisis checklists and telephone trees

This section contains five one-page crisis checklists plus sample telephone trees that have been created to facilitate an organized process in planning for, and responding to, crises. They have been designed to be reproduced and distributed to the designated members of the Crisis Management Team. Checklists included are:

- Pre-crisis checklist
- Checklist during crisis
- Post-crisis checklist
- Responding to emotional reactions during a crisis
- What professional debriefers will want to know checklist
- Sample telephone trees
Pre-crisis checklist

- Does our organization have a crisis management plan in place?  ___ Yes  ___ No
- If yes, who has the plan? ________________________________
- What is my role?  ______________________________________
- Do I have a copy of the telephone/notification tree? Where am I on it? ________________________________
- Have we identified needs, skills, and personnel required for immediate response?  ____ Yes  ____ No
  (For example: evacuation plan, first aid training, CPR, fire containment, crisis team training, crisis debriefers, police, etc.)
- Do we drill regularly?  ____ Yes  ____ No
- Have we identified & secured external resources we may need?  ____ Yes  ____ No
  (For example: EMTs, fire fighters, police, crisis debriefers, any back-up from other organizations, etc.)
Checklist during crisis

- Determine what is happening or just happened:
  * To whom __________
  * Where __________
  * When __________
  * Has anyone been injured? ____ Yes ____ No
  * Have there been any deaths? ____ Yes ____ No
    - If yes, list who and their status:

- Are First Responders (medical, fire, police) needed? ____ Yes ____ No
  * If yes, call 911 (or insert your emergency response number here).

- Is there on-going threat of danger or harm? ____ Yes ____ No
  * If yes, specify:

- Does the area need to be protected or secured? ____ Yes ____ No
  * If yes, notify identified personnel to attend to employees and customer safety
  * Notify identified personnel to secure the facility

- Is evacuation necessary? ____ Yes ____ No
  * If yes, follow evacuation procedure
  * Notify identified personnel to employees and customer safety

- Notify Crisis Management Team Members.
  * Identify if others need to be notified, or are needed to manage the incident
  * Follow procedures of your crisis management plan
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Post-crisis checklist

- Notify and schedule external professional resources needed to help employees and customer post-incident
  
  Resource: ________________  Phone: ________________
  Resource: ________________  Phone: ________________

- Arrange for post-incident debriefings

- Determine what information should be given to employees and customers
  * Determine who will tell them  Name: _______________________
  * Determine best way to communicate:
    _______ Face-to-Face  _______ Written  _______ Combination
  * Follow procedures for internal communication

- Decide what services or outreach will be provided for families
  * Identify who will communicate to families: _______________________

- Decide what information should be given, and when it should be given
  * Determine what communication should be provided to organization community
  * Identify who will deal with the media: _______________________
  * Determine where the community can call with questions or for information
    Name: _______________________
    Phone Number: ________________

- Review status of the critical incident
  * Check with team if any new information or needs arise. Develop contingency plan if needed.
    _______________________
    _______________________

- Reassess your crisis management process for any adjustments or additional training you may need
Responding to emotional reactions during a crisis

Responding to the immediate emotional reactions of employees and customers during and immediately after a crisis, can be difficult for members of the administrative team. People will want information about what happened; rumors may begin to surface if factual information is not provided. Section I has more detailed information on the trauma response and variations in employees’ responses, but here are primary considerations to guide you in your response:

- People do need to know that the incident is real
  * Determine what information should be communicated to staff
  * Determine what information should be communicated to the employees
  * Information communicated should be factual and delivered in a straightforward manner
  * Communicate the information in person if at all possible
  * Provide updated information as the situation progresses

- Be prepared for potentially strong and varied emotional reactions from employees and customers immediately following the incident. Reactions could include:
  * Shock
  * Denial and Disbelief
  * Fear
  * Anger
  * Survivor Guilt
  * Vulnerability
  * Grief
  * Hysteria
  * Blaming - the organization, the victims, etc.
What professional debriefers will want to know prior to come-on-site

- What happened-- the nature of the incident?
- Where and when did this happen?
- Who was affected?
  - Was anyone physically injured?
  - Were there any fatalities; if yes, who?
- Is there a continuing threat of danger or harm?
- Were emergency responders notified and at the scene of the incident?
- What stress reactions have been observed thus far:
  - behavioral?
  - motional?
  - physical?
- Was there criminal impact, and are the police involved?
Sample telephone “tree”

EFFECTIVE JANUARY 1, 2005

EMERGENCY OR CRISIS OCCURS

ADMINISTRATION RECEIVES CALL

911?
(IF NECESSARY)
SUPERINTENDENT NOTIFIED

PRESIDENT

DIRECTOR OF SECURITY

RISK MANAGER

VICE-PRESIDENT

HUMAN RESOURCES

DIR. OF COUNSELING

EXTERNAL RESOURCES

PUBLIC RELATIONS/COMMUNICATIONS
Sample emergency phone list

Listed below are the phone numbers and pager numbers of people to contact in the event of a crisis situation. Please call these individuals in the order listed. If there is no response, then call the next person on the list.

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<tr>
<th>Contact name</th>
<th>Phone #s</th>
<th>Time called</th>
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## Sample emergency phone list (continued)

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**Crisis planning and prevention**

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**Emergency phone list**

Listed below are the phone numbers and pager numbers of people to contact in the event of a crisis situation. Please call these individuals in the order listed. If there is no response, then call the next person on the list.

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Effective Date: _______
Employee handouts

This section contains six one-page handouts that are designed to provide helpful information to organization’s employees who have experienced a critical incident. They have been designed to be reproduced and distributed to individuals and their family members following a serious incident. Subjects addressed are:

- Critical incidents and trauma
- Common stress reactions to trauma
- Caring for yourself
- Family reaction and support
- How friends and other employees can be supportive

Note: The above information begins on the next page.
Critical incidents and trauma

A critical incident is a single incident or sequence of incidents which are sudden and/or unexpected. A critical incident overwhelms a person’s usual coping mechanisms, and contains real or imagined threats. It also interferes with one’s ability to function either at the time of the incident, or later.

Some examples of critical incidents include:

- Death of a key employee in a car accident
- Accidental/unexpected death of an employee
- An employee suicide
- A manager assaulted by an employee; an employee assaulted by a manager
- Natural disasters: tornados, floods, fires, etc.

Critical incidents evoke a trauma response. The trauma response is a set of stress reactions each person experiences as a result of their involvement in the incident. These stress reactions are normal responses to what has been an abnormal situation, and include physical, emotional, and cognitive symptoms. These symptoms are considered normal in every way—they develop in most people facing stress, threat, or loss, and are primitive responses of the mind and body designed to help the person survive.

Experiencing a trauma can be painful and frightening. One of the most effective means of coping with trauma is called Critical Incident Stress Debriefing (CISD). The CISD is a structured approach to the management of stress responses. It entails either an individual or group meeting between the people directly involved in the incident, a trained CISD leader, and a mental health professional who is experienced in helping people talk through their feelings and reactions to the incident.

The CISD helps to alleviate overwhelming emotional feelings and potentially dangerous symptoms and side-effects. It provides a safe environment in which to express pent-up emotions. It is likewise an educational opportunity for stress reduction and discussion of signs and symptoms of stress that might materialize at a later point.

In general, the signs and symptoms of trauma do lessen with time. Usually trauma reactions become less intense and disappear within a few weeks. If your symptoms are not diminishing, and they continue to interfere with your ability to resume your normal routine and lifestyle, please seek counseling. Your human resource manager, local social worker, your EAP (if your organization has one), or your community mental health center are all able to help refer you to a qualified counselor.
Common stress reactions to trauma

Even though trauma has different effects upon people, there are some common reactions that you might experience. You may experience symptoms right away or perhaps not for several days or even longer. It's important to remember that the stress from trauma is a normal response to an abnormal situation. These reactions are part of the healing process.

**Physical symptoms:**
- Difficulty Sleeping/Nightmares
- Fatigue/Exhaustion
- Upset Stomach
- Rapid Heart Rate
- Appetite Changes
- Headaches
- Nervous Energy
- Other Muscle Aches

**Emotional reactions:**
- Fear
- Grief
- Anxiety
- Denial
- Anger/Irritability
- Feeling "Numb"
- Feeling Helpless/Hopeless
- Easily Startled

**Thought process:**
- Flashbacks
- Difficulty Making Decisions
- Confusion
- Unable to Concentrate
- Difficulty Solving Problems
- Memory Lapses

In general, the signs and symptoms of trauma do lessen with time. Usually trauma reactions become less intense and disappear within a few weeks. However, if your symptoms are not diminishing, and they continue to interfere with your ability to resume your normal routine and lifestyle, please seek counseling. Your human resource manager, local social worker, your EAP (if your organization has one), or your community mental health center are all able to help refer you to a qualified counselor.
You have experienced a trauma. How is it affecting you? Are you having difficulty sleeping? Do you feel fatigued or anxious? Have you reverted back to some old habits, such as smoking? Have you lost your appetite? Or do you find yourself eating more than usual? Are you bothered by headaches and other body aches? Is it hard to concentrate at organization and home? Do not worry---If any of these are familiar, you're not alone. These are normal reactions and are part of the healing process. Although there is no way to eliminate these uncomfortable feelings, there are a number of things you can do to minimize the effects.

First of all, refrain from making any big decisions, such as changing jobs, switching majors, or transferring to a different organization. Give yourself time before you make these types of changes. It's more important to simply maintain all your good habits at this time. Below are some helpful ways to help you cope.

- Keep to your everyday routine as much as possible. Maintain your regular organization schedule as much as possible
- Periods of physical exercise, alternated with relaxation, will help to alleviate some of the physical reactions during the first few days following the crisis
- Talk to people who care about you. Talk is the most healing medicine
- Do things that feel good to you; that you enjoy
- Acknowledge that you're going to feel a lot of emotions. Give yourself permission to feel them and share your feelings with others you trust
- Avoid the use of alcohol and other drugs-including too much caffeine during this time. Try to eat regularly and nutritiously
- Sleep is important. Make sure you allow enough time for a full night's sleep. If nightmares disrupt your sleep, try napping at other times when possible
- Keep busy, but not so busy that this becomes a way to avoid facing the reality of what you experienced
- Call a professional if symptoms persist
Family reactions and support

Critical incidents can have a profound effect not only of the employee directly involved, but also on their family members. Side effects of traumatic stress might surface at home in the form of anger, frustration, grief, depression, confusion, and/or disillusionment. Family members can become the convenient targets of the employee’s misplaced emotions.

Additionally, the families of those involved in critical incidents might show similar signs of stress. Spouses might adopt the roles of either supporter or victim. Frequently, they find themselves alternating between these roles--at times being able to support and nurture, while at other moments feeling terribly vulnerable, alone, and in need of support themselves.

Below are several suggestions for offering support and compassion during this time:

- Emotions are high after a trauma. Refrain from making any hasty family and personal decisions, such changing jobs or relocating. It's much better to wait several weeks before considering these and other types of choices and decisions.

- Include everyone in the family in the healing process. Although it is natural for parents/spouses to want to protect their children from the trauma, it's always better to tell them the truth--in ways they can understand, given their ages. If you do try to shield them, sooner or later they will know something is wrong, but by not knowing what, may think that they are to blame.

- Trauma puts a strain on relationships. Marital and family problems are not unusual after a major trauma. Ignoring the problems does not resolve them. Counseling can be very helpful, and there are counselors who specialize in working with people who have experienced trauma. Organization counselors, an EAP professional, or your local mental health agency can all help direct you.

- It's important for families to continue to do things together that they enjoy. It can be little things such as a walk, a special meal together, or simply time to reflect and talk about the things for which you are grateful.

- Be gentle with your family members as well as with yourself
How friends and other employees can be supportive

What can you do when your friend or fellow employee has been involved in a crisis or traumatic event? You may feel that you do not know what to say, so you just avoid it. Perhaps you feel embarrassed or afraid. Other people's trauma can be very upsetting—even frightening, to you. You want to help, but you just do not know how.

There are ways to show your friend/fellow employee that you do care and want to be supportive. Here are some suggestions to help you:

- Don't pretend or act like nothing happened. Although this may seem like the easiest thing to do, it is not helpful to the person's healing. It's better to acknowledge what happened, whether you do this in person, or send a note, card, flowers, etc.

- It's okay to ask your friend if he/she wants to talk about it. Simply asking "Would you like to talk about it?" is all that's necessary. If your friend does want to talk about it, you can be the most supportive by being a good listener, even if he or she repeats some things about the trauma many times. This is an important part of his/her healing and "getting over" the event. Listening is one of the best ways to show you care for him or her.

- Don't tell your friend "I know just how you feel". You may think you do, but you weren't there when your friend experienced the trauma. It's more important to let your friend tell you how he or she is feeling. Everyone's reactions are unique.

- If you ask your friend/fellow employee if he/she wants to talk about it, and he/she says no, just accept this and do not push. You can let your friend know that, if he or she wants to talk about it at a later time, you'll be there to listen.

- Do include your friend in things you usually do together. Whether you both like sports or going to the movies, do not be afraid to let your friend know you want to continue to do the things you both enjoy.

- Be patient. It may take longer than you think for your friend to recover from trauma. Your friend may be "up and down" for awhile. It's not unusual that your friend may seem "back" to his/her usual self for a period of time, only to relapse. This kind of behavior is normal for people who have experienced traumatic incidents.

- If after several weeks, your friend's behavior and emotional health remain unchanged or worsen, and your friend is not involved in counseling, encourage him/her to see the organization's EAP for help.

- Do tell a professional about your friend's issue if you're concerned for their safety.