



# PUBLIC TRANSPORTATION REPORT

Issue 2/2016

Protective Insurance Company



## Crisis Management and Emergency Planning

**Expect the unexpected.** An often overused cliché, but planning and practicing for unthinkable events is more critical than ever in today's world. With technology and social media linking the world in seconds, there is no longer a margin for error. An emergency or crisis is a situation that has reached a critical phase in which immediate decisions introduce the possibility of a highly undesirable outcome. The "accident" that leads to an emergency or crisis is often described as unexpected. However, according to the National Safety Council, "managing safety starts from the premise that most accidents can be prevented." Therefore, accidents are not random, but rather a sequence of events that can be prevented with proper management commitment, evaluation and controls, ongoing planning, monitoring and training.

In simple terms, there are **four basic steps in crisis management and emergency planning**:

- ➊ Establish a planning team
- ➋ Analyze hazards and capabilities
- ➌ Develop the plan
- ➍ Implement, practice and refine

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## Crisis Management and Emergency Planning, Continued

### ① Establish a planning team

Starting with establishing a planning team, you should consider selecting individuals in key roles throughout your organization. You want accurate representation from all aspects of the company, but keep the committee size manageable at no more than 10 people. Next, define roles and responsibilities for each person on the committee. Further develop the committee by establishing authority and issuing a mission statement. Don't forget to appoint a team chairperson or crisis coordinator. This person will be the primary decision maker and public relations speaker.

#### + KEY ROLE

Appoint a team chairperson or crisis coordinator.

According to Jim Parham, COO of Hiron & Company, an Indianapolis-based public relations firm, "from a public relations perspective, it really comes down to one word: communication. This is much more than an emergency telephone call tree. It's a detailed plan on who should be contacted and why, how to interact with various public entities, legal representation and ultimately the general philosophy of executive management."

The first priority in any crisis is to assess the situation, call authorities and minimize further injury or property damage. In an immediate emergency, it's not a good idea to instruct your drivers to always call dispatch first. This could lead to critical delays and communication breakdown. Jim continues, "Always remember that options will be limited, so your company should display consistency, credibility, accuracy and speed."

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To attain this, consider developing a press kit. This press kit could include the company background, photos and descriptions of the facilities, relevant facts such as the annual report and community relations, and executive biographies and photos. Most importantly, you should have pre-written statements on various scenarios at your disposal.

### ② Analyze hazards and capabilities

Let's move to the second step in crisis planning, analyze hazards and capabilities. Begin by collecting all relevant policies, procedures and documents that exist. This includes all facets of the company, from executives to operations, drivers and support staff. Pay particular attention to gathering as much detail as possible on incident reporting and emergency procedures, such as a call tree, first responders and investigation steps. Next, perform a vulnerability analysis or risk assessment. A vulnerability analysis can be a very detailed assessment tool or a simple spreadsheet that lists scenarios with an assigned probability of occurrence and severity of impact. Start with the most basic issues that require emergency response such as fires, floods, tornadoes, winter storms, earthquakes and hurricanes. Then list everything you can think of that could go wrong, from environmental spills to worker injury, motor vehicle crashes, workplace violence or terrorism and even utility/technology failures.

Next, try to identify your critical processes, services, operations and people. Is there something or someone that if removed, even just temporarily, would have an immediate and detrimental impact on the business? Quantify both the vulnerabilities and criticalities in relation to time, dollar impact, brand and reputation. Finally, to truly understand the hazards and your capabilities, meet with outside subject matter experts. This includes state/local emergency authorities, regulatory agencies, insurance specialists and safety consultants. Invite them to your planning sessions to ask questions.

### ③ Develop the plan

The next step is to actually develop the plan and document the team's work. Start by drafting an executive summary and table of contents. Organize the documents you've collected such as procedures, contacts, diagrams and vendor/utility lists into groups. Include specific steps and instructions, perhaps in a flow diagram or decision tree format. Try to answer questions like, "If this happens, who is notified? How are they notified? What action is taken and who is responsible?"

Allow ample time for review and approval from each member of the team. Work one section at a time and pull the pieces together at the end. As you near completion of the first draft, consider exploring other resources such as smartphone apps that can help streamline communication and provide real-time access to your critical plan documents.

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#### 4 Implement, practice and refine

Finally, once the initial plan has been drafted, it's time to implement, practice and refine. Implementation consists of announcing the existence of the plan, distributing copies and training key people and affected individuals. Be sure that everyone in your organization understands their roles and has clear instructions on what to do and what not to do. To accomplish this, consider developing a wallet-sized "crisis card" for drivers that contains emergency contact info, first step instructions, securing the site with law enforcement and a strict

policy against discussing details with emergency responders or the media until designated company officials arrive on scene.

The plan is not something that once drafted and implemented sits on the shelf—it should be tested on a regular basis with outside organizations such as local law enforcement and fire departments. Furthermore, consider conducting drills or exercises that simulate actual emergencies to work the details and timing. This allows for continuous improvement and modifications as necessary. ■

## Customer Care and Passenger Safety

The public transportation industry carries the most valuable cargo—people. Customer service and unwavering commitment to safety gives your company an edge over the competition. In today's world, threats are numerous. You've seen the news reports on shootings, violence on the bus and horrific accidents on the road. At a very basic level, there are **three key components of customer care and passenger safety**: preparation, practice and passenger control.

### + KEY COMPONENTS

- 1 Preparation
- 2 Practice
- 3 Passenger Control

#### 1 Preparation

Your obligation to the motoring public and the safety of your passengers starts with good customer service. Never underestimate the importance of—or the time involved with—preparation, no matter

how long you've been doing the job. Prior to each trip, ensure the driver has met all regulatory and company policies and procedures, including pre-trip inspections, mirror adjustments, route planning and being well rested. Ensure they will be flexible and sensitive to the needs of your passengers and communicate regularly; if passengers are not updated on all facets of the trip, they may become nervous. It is also important to outline the safety features of the vehicle and expectations of passengers. Passengers should be reminded to stay seated, use seat belts and handrails, know the location of fire extinguishers and follow evacuation procedures. This not only shows good customer service, but also demonstrates the driver is attentive and in control.

#### 2 Practice

Just like in athletics, practice makes perfect. A driver will not be able to perform under duress unless you've made emergency procedures routine. Hands-on training is often the most effective, but practice begins with the driver's own personal habits. For example, there is no message more damaging to your passengers than not wearing the seat belt or passing vehicles to make up lost time. Drivers should practice how to deal with distractions or unplanned events. If passengers are talking excessively to the driver, they should politely inform them safety is the first priority and they must concentrate on driving. If they experience an emergency, regardless of how minor it might be, their job is to control the scene.

They should be prepared and trained to proceed to the nearest roadway exit, side-street or parking lot to minimize exposure to traffic. In most situations, it is usually safest to keep everyone in the vehicle unless the danger is inside the bus. Calling dispatch first in a true emergency will delay response time and prove to be poor judgment in subsequent investigations.

#### 3 Passenger Control

Passenger control techniques are the most underutilized and misunderstood topics in the industry. Often, the company and drivers blur the line between customer satisfaction and safety. We do not place enough emphasis on how to handle threats from non-passengers such as the general public, terrorists, active shooters, student violence and even angry parents. According to Jesus Villahermosa of Crisis Reality Training, Inc., "most drivers and companies alike recognize there is a distinct possibility, but they don't know what to do or where to start in regards to that possibility. I tell them to expect the unexpected and to remember

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that when someone has been interviewed from an incident after it occurred; almost all of them have made a statement to the effect of, "We never thought it would happen here!"

Mr. Villahermosa suggests companies train drivers on crisis management by focusing on the acronym **I-A-M: identify, assess and manage**. Identifying a threat begins by being aware of your surroundings and learning to recognize body language indicators, which can be precursors to violence. Mr. Villahermosa continues, "If you think and feel something bad is about to happen then you need to start trusting that instinct and take some action that will eliminate or mitigate whatever you perceived the threat to be." Reasonable responses include locking down your bus, driving away or making an emergency stop and allowing passengers to exit the bus to get away from the internal threat.

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Mr. Villahermosa recommends training drivers on reasonable and necessary defensible use of force and de-escalation techniques, "We are teaching drivers to learn verbal response techniques that could de-escalate that incident without it ever getting physical. Everyone has a legal right to defend themselves, so we also discuss what your options and legal obligations are if it does get physical."

Managing a situation requires training the driver on options and, most importantly, making a decision. In stressful situations, it's human nature to choose fight or flight. Unfortunately there's a third reaction—freeze. Companies and drivers must realize that the worst decision is no action and inadequate training can expose the risk of vicarious liability. Although no one likes to talk about the possibility of these types of incidents occurring, these are the very questions where drivers are looking for reality-based answers. ■

*Jesus Villahermosa, Jr. is the President of Crisis Reality Training, Inc., a firm that specializes in assessment, policy, procedure and protocol development for crisis situations. He has partnered with Protective to develop reality-based tools and training for the public transportation industry. To learn more, please visit [www.crisisrealitytraining.com](http://www.crisisrealitytraining.com).*

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