



# CHECKLIST: What to Do in an Emergency

presented by  
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**Loss Control Manager**



**2023 BISC Summer Meeting**  
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**A serious incident involving one of your company's coaches has just occurred...**

**Are You Ready?**



# Developing a Crisis Plan

- Do you already have a plan? If so, does it need to be dusted off and updated?
- There is no specific checklist for this process; a plan has to be tailored to YOUR operation





# Developing a Crisis Plan (cont'd)

- Who to include on the team
- Key duties/tasks in priority order
- Phone log
- Management list/contact info
- Who has access to the complete written crisis plan
- Team training
- Practice
- Review and update



# Purpose of Developing a Crisis Plan

- Get personnel organized, and ensure all team members know their roles
- Help company gain control of all aspects of the incident within the first 24 hours of the event
- Identify resources prior to an incident
- Help prevent any bad situation from becoming much worse



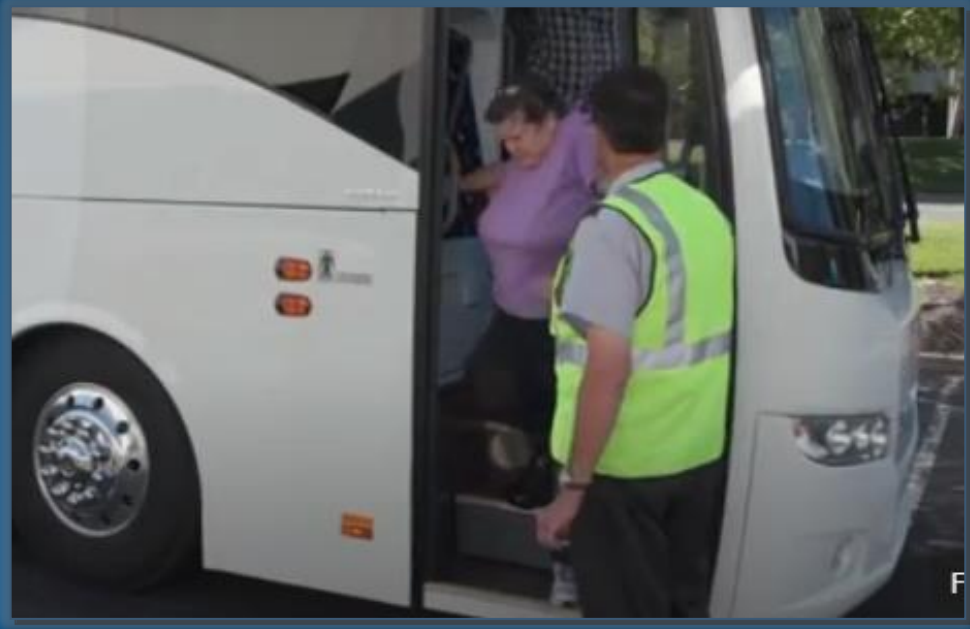


# Crisis Plan Elements

- Protecting the passengers
- Managing the accident scene
- Communicating
- Sustaining operations
- Upholding the company's professional reputation
- Educating and training drivers and employees



# Protecting the Passengers



- Pre-trip safety briefing
- Training driver in his/her role
- Delegating to others (e.g., chaperones, leaders, tour guides)
- Arranging alternative transportation; continuation of trip

# Managing the Accident Scene

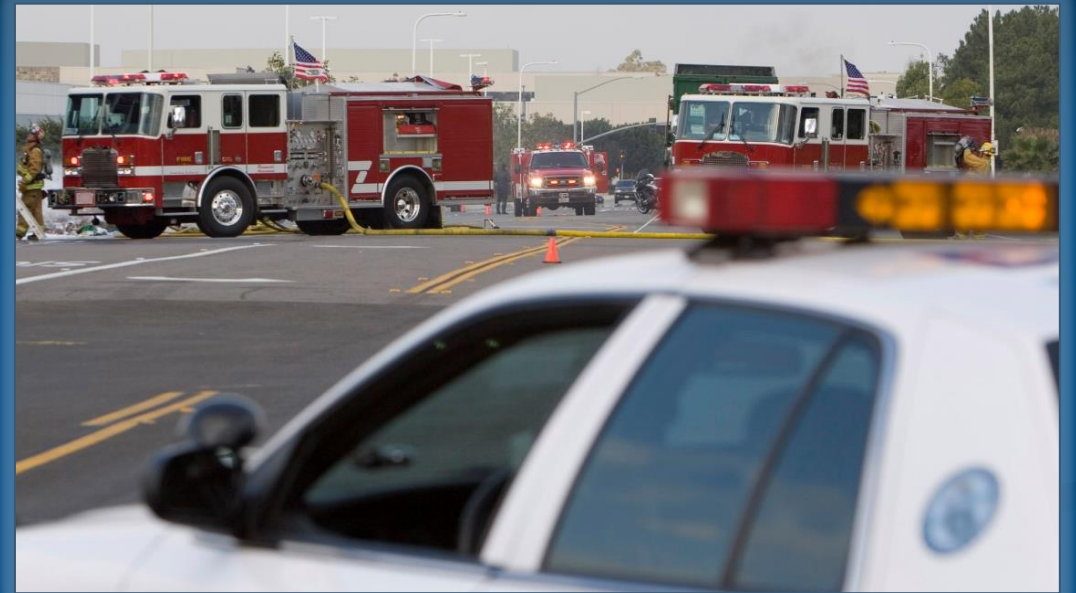


[www.lancerinsurance.com/safety/manage-accident-scene](http://www.lancerinsurance.com/safety/manage-accident-scene)



# Managing the Incident

- Role of the driver
- Identifying staff roles
- Assigning backup roles
- Contact information for staff
- After hours contacts
- Creating a call log
- Determining whether you should stay or go
  - Traffic
  - On phone while en route?



# Initial Notification of the Incident

- **By phone**
  - Driver
  - Law enforcement
  - Passenger
  - Chartering group
  - Witness
- **Through technology**
- **On social media**
- **From media**



# Company Response

- Notification of crisis team
- What do you know so far?
- What do you know about the trip?
  - Charter order
- Notification of other drivers
- Notification of driver's emergency contacts
- Company social media and posts
- Command post





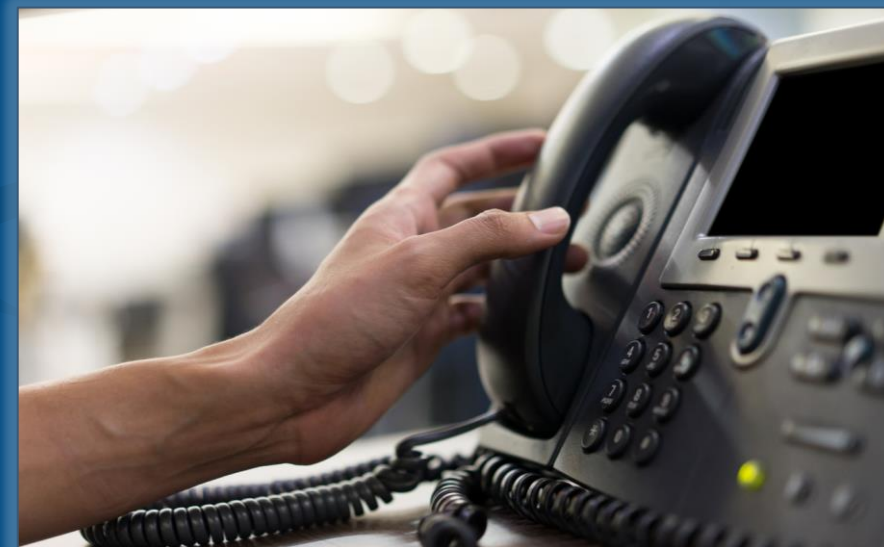
# Communicating: Incoming Calls

- **Listening; remaining calm, professional and courteous**
- **Prioritizing calls**
- **Forwarding calls to the proper person**
- **Returning calls**
- **Gathering information from callers**



# Phone Log

- Easily accessible and identifiable
- Keeping detailed notes; facts not speculation
  - Name, call back number, day and time of call, is person on site?
  - Relationship to event (e.g., passenger, parent, witness, law enforcement)
  - Who took the call?
  - Does person require a call back?
  - Who was call referred to?
  - Did person receive a call back?



# Communicating: Driver

- Listening
- Keeping driver calm and focused
- Has 911 been notified?
- Evacuation, smoke, fire, injuries, egress
- What does driver need from you? How can you assist driver?
- Instructions for driver – reminders of their on-scene duties
- Communicate with driver often





# Communicating: Insurer

- Reporting accident to insurance company – prompt notification regardless of fault
- Assistance that claims department can provide handling calls
- Information insurer may request
- Attorney-client privilege



# Communicating: Clients

- **Contacting the chartering party**
- **Obtaining passenger list/roster**
- **Updating clients**
- **Identifying contact person(s)...who's in charge?**
- **Notifying destinations**



# Communicating: Law Enforcement

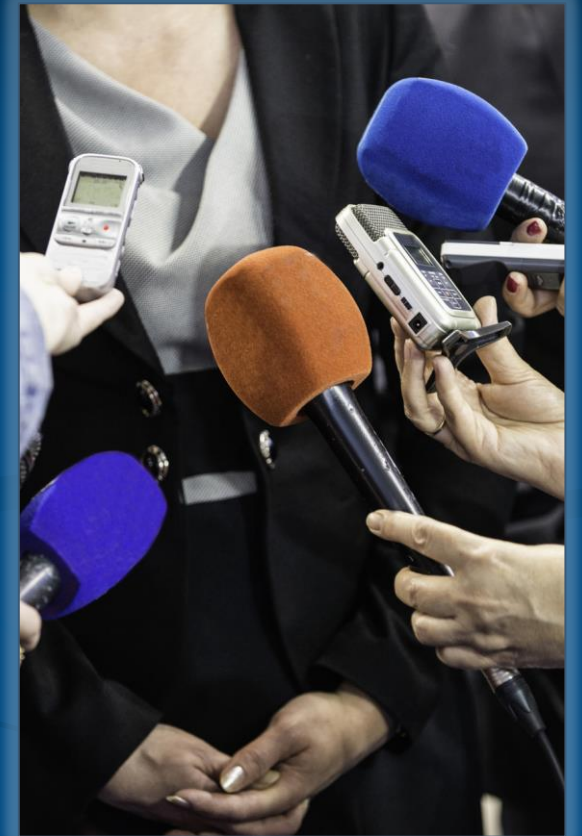


- Information driver is required to share with authorities
- Citations issued to driver
- Information authorities may request from motor carrier
- Post incident records and compliance review



# Communicating: Media & Social Media

- Handling requests for comments; need to respond promptly, accurately and confidently
- Securing the office
- Identifying the company spokesperson
- Consulting with company legal counsel
- Making media statements
- Responding to posts on social media
- Company reputation can be positively or negatively impacted



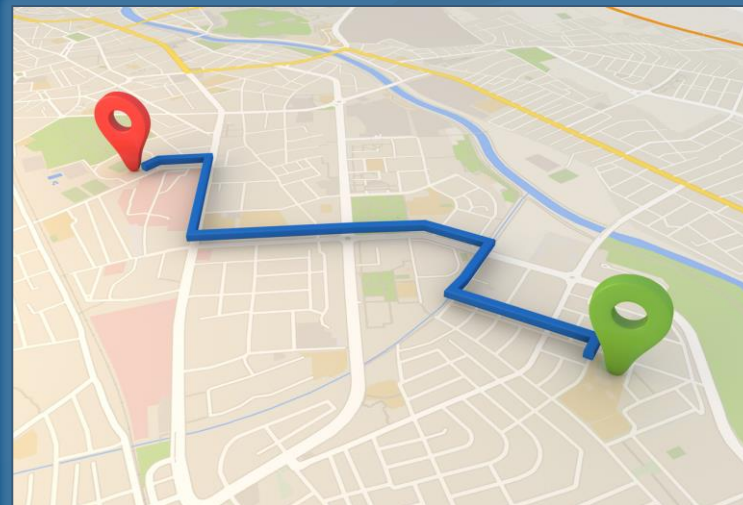
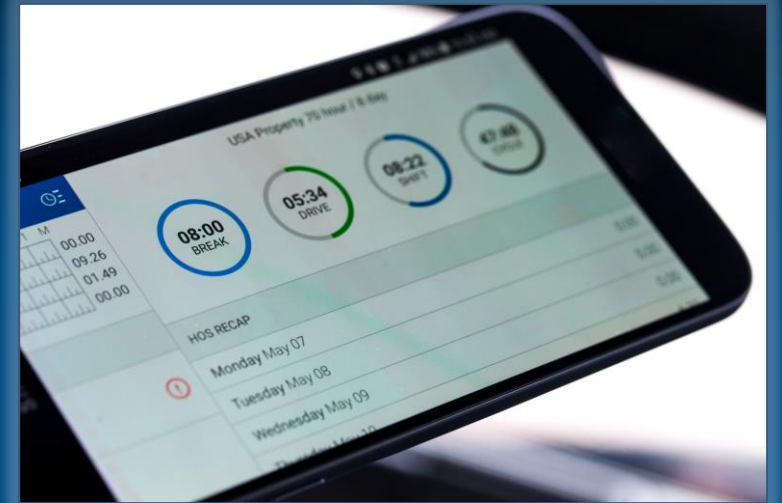
# Communicating: Others

- OSHA – serious injury/fatality
- EPA or state environmental agency due to large fuel leaks
- Post-accident drug and alcohol testing (§382.303) – after hours contact
- Alternate transportation providers
- Service providers (e.g., tow trucks, clean-up crews)
- Workers' compensation carriers



# Gathering Data: Technology

- Smart phones
- Dash cameras
- Electronic logging devices (ELDs) and telematics
- GPS devices – planned travel routes
- Video feeds
- Photos





# Documents to Obtain/Secure

- Passenger list/ roster
- Charter order
- Driver qualification file
- Maintenance files
- ELD information
- Electronic video recording (EVR) information
- Phone logs



- Supporting records
- Record retention

# Creating a “Go” Kit

- Cell phone
- Cell phone charger
- Important phone numbers
- Flashlights
- Inclement weather gear



- Reflective vests
- Luggage tags
- Bags, containers
- Witness cards
- Pencils, markers
- Etc.

# Practice Makes Perfect!

- Plan should be in writing
  - If you say you are going to do it, do it!
  - If you put it in writing, expect it to be read to a jury
- Training of crisis team
- Practicing at least once a year
- Reviewing plan annually
- Updating your plan as needed





# Sustaining Operations

- Everyone who is not on the crisis team should continue to conduct business as usual
- No one but the designated person(s) on the crisis team should speak to anyone outside the company about the incident
- Arranging replacement drivers and coaches for upcoming trips





# Thank You for Participating!

presented by  
**Daniel Tomlinson,**  
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**LANCER**  
INSURANCE  
*The Difference is Our Attitude.*

**BUS** industry  
**SAFETY** council

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