

GROUP LIFE  
& HEALTH

ONLINE EDUCATIONAL BOOKLET

MANAGING CRITICAL INCIDENTS IN THE WORKPLACE

*Well.*  
And well worth it.



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## Introduction

A violent bank robbery, an accident on site, an intruder who invades the workplace and intimidates staff, a co-worker dies in a car accident or commits suicide, your workplace is bombed. What do these situations have in common? They're all examples of "critical incidents" that could have a profound effect on employees and organizations alike.

Traumatized individuals may need to take stress leave, experience physical symptoms, such as headaches, that cause them to take frequent sick days, emotional symptoms such as angry outbursts or sobbing uncontrollably and generally a feeling of being unable to function in any aspect of their lives.

The consequences of such incidents reach far beyond those directly injured or frightened by the event. Staff members acquainted with those directly involved may also suffer extreme emotional trauma, becoming distracted and unable to concentrate on their work. Their attitude towards their jobs and workplace can be seriously affected, and that means poor morale, greater staff turnover, more absenteeism, increased accidents and higher disability claims. The organization is also traumatized.

Because one critical incident can seriously affect the emotional and psychological well-being of staff as well as the productivity of the organization, it's essential that managers respond to these incidents appropriately and effectively. This is time for leadership, compassion and understanding.

*More information and assistance is available through Expert-Aide, a service that offers professional coaching and consultation for managers to help them deal with employees who are facing difficulties. Orientation sessions and online booklets are also available, as are referral services for employees who are facing difficulties that effect, or could effect, their job performance. Contact Expert-Aide at 1 866 314-9533 (English service) or 1 866 314-9534 (service en français).*

# Defining critical incidents

A critical incident is any sudden or traumatic event that affects people's emotional lives, feelings of security and their ability to cope. People feel the emotional, mental and physical reactions for weeks, even months.

Critical incidents fall into three categories:

## 1. Special Incidents

Special Incidents do not usually involve employees directly. They include such events as a fellow employee involved in an accident or dying from natural causes.

## 2. Critical Incidents

Critical incidents involve and directly affect employees. The level of trauma can range from low to moderate and productivity may be affected. Examples of critical incidents include:

- a robbery
- an on-site death
- an employee threatens violence or takes violent action against another staff member
- a work site accident
- an employee killed in off-site accident or incident
- an employee suicide.

## 3. Catastrophic Incidents

Catastrophic incidents have an extreme impact on the workplace. They draw media attention and significantly affect, even halt, productivity. Examples of catastrophic incidents include:

- an on-site shooting or hostage taking
- an act of terrorism
- an airplane crash
- a bomb or natural gas explosion
- a natural disaster such as fire, earthquake, hurricane, tornado, etc.
- an incident that inflicts a severe level of trauma to a large number of employees or to the workplace itself.

## A timely response

A traumatic workplace incident presents serious challenges for any organization, large or small. When a critical incident occurs, it's the manager who must step in and deal with the situation. Prompt action and clear leadership can lessen the impact of the incident on other employees, diffuse an already explosive situation and provide leadership in a chaotic situation. It's essential to facilitate a rapid and effective response by following these 10 steps.

### During the incident:

1. Assess what happened immediately.
2. DO NOT downplay an incident.
3. Remain calm.
4. Remove employees from the situation immediately, depending on its visibility.
5. Facilitate communication, where necessary, to police and emergency personnel, security and other employees.
6. Provide employees with medical attention, if required.

### After the incident:

7. Contact your EAP immediately to arrange for trauma response and facilitate the necessary help for employees directly and indirectly affected by the incident. Identify those most affected and secure immediate emotional and psychological assistance.
8. Before employees leave the premises, encourage them to spend time with family and friends. Traumatized individuals need support.
9. Consider any legal implications before talking to the media. Most companies designate a spokesperson. Instruct staff on what to do when approached by the media and guard affected staff members and their families from intrusion.
10. Document the incident thoroughly.

## The effects of a critical incident

People who experience a traumatic event, directly or indirectly, often feel overwhelmed by the event. Some common reactions of critical incident stress are:

- preoccupation with the event
- anxiety
- depression and/or deadening of emotion
- changes in social contacts
- attention, memory and concentration problems
- erratic behaviour and mood swings
- changes in eating habits
- headache, rapid heartbeat and bodily tension
- poor sleep
- physical and emotional exhaustion.

People may experience some or all of these reactions – which are normal reactions to abnormal events and will subside with time. Expect a variety of reactions from your staff. Some may experience uncontrollable crying or emotional outbursts, others may withdraw. In addition, the length and intensity of each individual's feelings will vary.

Some people, especially those directly affected by the incident such as an employee who has witnessed the death of a co-worker, will experience an additional psychological reaction called post traumatic stress disorder. Symptoms include:

- intense memories, flashbacks, dreams and nightmares of the incident
- sleeping difficulties
- withdrawal from people and situations
- deadening of normal feelings
- hyper-vigilance or jumpiness
- concentration problems
- increased use of alcohol and other substances

## The manager's role

Two factors greatly reduce critical incident stress:

1. Pre-trauma awareness. Education and familiarization with emergency procedures and critical incident stress can help protect your work group.
2. Prompt support after a critical incident.

### How to respond

- Communicate. Stick to the facts and clearly explain what has happened. Let your staff know you will keep them informed as accurate information becomes available. It's important to quash rumours that will only increase stress and anxiety levels.
- As soon as possible after the event, ask staff members how they're feeling, even if this means a call to their homes.
- Encourage your staff to talk about the experience and express their feelings to one another and with their families, friends and other people who understand the details of the experience.
- Look for signs of obvious distress and refer distressed staff to their EAP for help. These signs include:
  - wandering aimlessly
  - unjustified angry outbursts or uncontrollable crying
  - staring
  - a shock-like state
  - disorientation
  - isolation from group
- Don't take behaviours personally. Remember that emotional outbursts are often a symptom of critical incident stress. Allow staff members to feel a wide range of emotions including shock, rage, fear, sadness, anxiety and guilt.
- Let staff know there are no "right" or "wrong" feelings. Demonstrate your awareness and understanding of their feelings and concerns.
- Listen to and acknowledge points of view, even if you don't agree with them.
- Take care of yourself and your feelings about the incident. Don't try to resolve everything yourself and don't ignore your needs. Talk to and seek support from other managers and your EAP.

## Critical incident intervention

To reduce the intense reactions of staff members to the incident and assist them in returning to some normalcy, organizations should establish a three-step critical incident intervention. Participation should be voluntary.

### 1. Demobilization

Critical incidents trigger a wide range of physical and psychological symptoms. Demobilization is meant to ease individuals from a highly aroused state into a more normal one. A manager who was not involved in the incident, or affected by it, should carry out demobilization:

- convene a staff meeting as soon as possible
- encourage staff to express their reactions
- summarize the incident and clarify uncertainties
- show sympathy and understanding
- draw up a plan of action, taking into account the needs of staff members
- make short-term arrangements for work responsibilities
- offer information on defusing and debriefing

### 2. Defusing

Defusing is conducted by a trained facilitator (often available through your company's EAP) and helps bring the incident to a psychological closure. This 30 to 45 minute session should take place before staff members leave the premises for the day and involves:

- reviewing the event
- an explanation of the physical, emotional and psychological effects people are experiencing, or will soon experience. The facilitator also provides information on how to take care of emotional and physical health and the resources available to those who require more support.

- encouraging employees to talk about what happened
- identifying current needs
- offering employees advice, information, referrals and support.

### 3. Debriefing

Debriefing is usually carried out within three to seven days of a critical incident, when employees have had enough time to assimilate the experience. It helps staff members cope with the continuing effects of a traumatic incident and move towards recovery. Debriefing focuses on the well-being of traumatized staff, not in finding the cause of the incident or assigning blame. Debriefing should be conducted by trained, qualified professionals who can guide strong emotions such as guilt, rage or anger. A debriefing:

- provides a professionally guided review of the impact of the incident on those concerned
- enables ventilation of emotions
- provides reassurance and support
- educates about trauma reactions
- advises of symptom management
- minimizes the potential for the development of psychological problems
- assists people in returning to normal levels of functioning
- identifies those who may need counseling or other additional help.

Follow-up debriefing sessions may be necessary, depending on the severity of the critical incident.

## The Aftermath: Reviewing the incident

Why did this event happen? Could it have been prevented? How can this company prevent similar incidents from happening in the future? To answer these questions, a two-pronged approach is advised.

### 1. Critiquing session

A critiquing session to review all aspects of the incident should be held as soon as possible following the intervention process. Management and staff work together to uncover deficiencies in the handling of the incident and provide corrective solutions. A critiquing session should examine:

- the way the incident was handled. Who responded?
- how the incident could have been handled more effectively.
- how the event could have been prevented. For example, would better security have stopped the incident?
- the effectiveness of the critical incident intervention.
- related company policies. Is there a contingency plan for emergencies? Does it need revising?
- related safety regulations. Was a safety regulation ignored? Do the regulations need to be more stringently enforced?

### 2. Corporate review

Within 30 days of the incident, senior management should conduct a broad review of all the steps taken in response to the event including:

- first aid. How did company-designated first aid attendants perform?
- emergency procedures. Did current procedures adequately address the situation?

- critical incident intervention. Are trained specialists available on short notice for interventions?
- corrective, preventive responses. What new policies or procedures will be put in place to prevent the occurrence of a similar incident?
- claims management. Are workers receiving adequate follow-up care while on a disability leave?

This review does not replace an accident investigation.

## Conclusion

The importance of a manager's role before, during and after a critical incident cannot be overstated. Studies show most workers feel it is their managers, not company policies, who set the tone for how they respond to trauma and grief. Setting that tone begins with being proactive and laying the groundwork for employees to better withstand the physical and psychological effects of any unforeseen traumatic event. This preparation includes:

- ensuring there is good morale and job satisfaction in the workplace
- suggesting that at least one senior staff member is trained in critical incident stress management
- knowing who to contact for immediate debriefing support
- informing staff about crisis incidents and the common types of psychological reactions, including post-traumatic stress disorder
- having a good knowledge of your company's emergency procedures

On the other side of the equation is recovery. Every company should have recovery plans in place because research indicates 47 percent of businesses that experience a fire go out of business within two years. The majority of businesses spend less than three percent of their total budget on business recovery planning, yet 93 percent of companies that experience a significant data loss are out of business within five years. Organizations, like people, need time to heal after a traumatic event.

Ensuring the emotional, mental and physical well-being of your company's human resources is just as, if not more, important. The ability of an organization to "bounce back" from a violent incident is directly related to the health and morale of the organization prior to the incident, the diversity of the incident, the positions and identities of those involved, and the response to the incident.

"Be prepared" should not only be the motto of scouting.

*For assistance with, or more information on, critical incident management, contact Expert-Aide at 1 866 314-9533 (English service) or 1 866 314-9534 (service en français).*

## Recommended reading

***Critical Incident Stress & Trauma in the Workplace***  
by Gerald Lewis

***Sitting in the Hot Seat: Leaders and Teams for Critical Incident Management***  
by Rhona Flin

***The Harvard Business Essentials Series: Crisis Management***  
by Harvard Business

***Flirting with Disaster: Public Management in Crisis Situations***  
by Sandra K. Schneider

***Communicating in Crisis: A Theoretical and Practical Guide to Crisis Management***  
by Michel Ogrizek and Jean-Michel Guillery

***Managing Crises Before They Happen:  
What Every Executive and Manager Needs to Know About Crisis Management***  
by Ian I. Mitroff

***Crisis Management: Planning for the Inevitable***  
by Steven Fink

***Crisis Management: Mastering the Skills to Prevent Disasters (Harvard Business Essentials)***  
by Harvard Business School Press



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