

ROLE DESCRIPTIONS AND PHASE ACTIONS

Role descriptions

Strategic lead

Role purpose: Retains ultimate responsibility for decisions; provides regular situational reports to key stakeholders; ensures decisions are implemented; makes initial contact with families, connecting them to family liaison.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Approves activation of the core CIMT and confirms roles and members. Agrees how and when the CIMT will initially meet. Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> Leads in briefing the core CIMT about the situation. Authorizes immediate actions that need to be taken by the CIMT to preserve life.
First meet	<ul style="list-style-type: none"> Approves the composition of the full CIMT (including optional and supplementary roles). Confirms responsibilities and role expectations with CIMT members. Agrees upon principles and 'ways of working' for CIMT. Approves final objectives for the critical incident response, considering wider implications on any other risk areas (e.g., reputation/public image, finances, project delivery, etc.). Considers what else the CIMT does not know (when developing the dashboards).
Respond	<ul style="list-style-type: none"> Provides a wider perspective of actions that need to be considered to manage the impact and aftermath of the critical incident. Approves external or internal communications. Approves actions required in preparation for best, worst, most likely and outlier scenarios. Approves financial expenditure. Approves the family support strategy. Calls / visits family to connect them to family liaison. Encourages a continual review of the critical incident response.
Close	<ul style="list-style-type: none"> Reviews final objectives, ensuring that they have been fully met. Reviews any requirements to contact external parties once the CIMT has been deactivated or when the critical incident is declared over. Approves plans to address outstanding actions that do not require further engagement from the CIMT. Emphasizes the importance of retaining confidentiality to all members of the CIMT, even after it has been deactivated.
Learn	<ul style="list-style-type: none"> Ensures a group learning review workshop is scheduled and facilitated by an impartial reviewer. Attends the group learning review and communicates gaps and improvements (from a strategic lead perspective). Approves any actions identified during the learning phase and ensures that an implementation plan has been created for each agreed action. Implements any actions assigned in the group learning review.

Security/deputy strategic lead

Role purpose: Advises on any safety and security implications; builds scenarios and possible outcomes; liaises with external security providers (where required), operational manager.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> ▪ Supports the strategic lead in determining whether a situation warrants the activation of the CIMT, and supports the operationalization of the CIMT ▪ Familiarizes themselves with the CIMT procedure if the team is activated, and leads operational procedures
First hour	<ul style="list-style-type: none"> ▪ Acts as the team manager, leading implementation of immediate actions that should be taken to preserve life. ▪ Supports the development of the 'first hour' dashboard. ▪ Liaises with external security providers to understand their capacity and capability to provide support. ▪ Contacts involved individual's embassies / governments / emergency services and others to notify them of the situation and determines the degree to which they can provide immediate or long-term support.
First meet	<ul style="list-style-type: none"> ▪ Confirms initial support package to partners, grantees and fellows (if appropriate). ▪ Supports the development of the 'after first hour' dashboard. ▪ Determines the need to use additional support from external security providers. ▪ Together with Context develops stakeholder maps that prioritize engagement with a variety of different actors. ▪ Advises the CIMT of any security trends or similar incidents and what implications this may have.
Respond	<ul style="list-style-type: none"> ▪ Liaises with other external security providers to implement agreed actions. ▪ Continues to collaborate with involved individual's embassies / governments / emergency services and others. ▪ Develops best, worst, most likely and outlier scenarios and advises of required resources. ▪ Identifies and advises on any safety or security issues that may arise. ▪ Ensures that decisions and actions are in line with values and advises the Strategic lead on what the implications could be if actions need to be taken that potentially violate them.
Close	<ul style="list-style-type: none"> ▪ Supports the strategic lead to review final objectives, ensuring that they have been fully met.
Learn	<ul style="list-style-type: none"> ▪ Conducts individual debriefings with HR and family liaison(s). ▪ Attends the group learning review and communicates gaps and improvements (from a security perspective). ▪ Implements any actions assigned in the group learning review.

Context

Role purpose: Advises on local context and/or programmes; ensures CIMT decisions are contextually appropriate; liaises with external stakeholders in the region / country.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> ▪ Supports the strategic lead in determining whether a situation warrants the activation of the CIMT. ▪ Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> ▪ Advises CIMT on local context and/or programmes to ensure that any first hour decisions are contextually appropriate and do not place affected persons at further risk. ▪ Supports the security/deputy strategic lead to identify other key stakeholders that need to be notified at the early onset of the critical incident. ▪ Liaises with other external stakeholders in the region / country to identify immediate actions to preserve life.
First meet	<ul style="list-style-type: none"> ▪ Advises CIMT on local context and/or programmes to ensure that any first meet decisions are contextually appropriate and do not place affected persons at further risk. ▪ Liaises with other external stakeholders in the region / country to identify their capacity and capability to provide support. ▪ Supports Security to develop local stakeholder maps that prioritize engagement with a variety of different actors. ▪ Advises the CIMT of any security trends or similar incidents and what implications this may have.
Respond	<ul style="list-style-type: none"> ▪ Advises CIMT on local context and/or programmes to ensure that any respond decisions are contextually appropriate and do not place affected persons at further risk. ▪ Continues to liaise with other external stakeholders in the region / country to implement agreed actions and develop an awareness to context and programme impacts.
Close	<ul style="list-style-type: none"> ▪ Supports the Strategic lead to review final objectives, ensuring that they have been fully met ▪ Thanks external stakeholders in the region / country (if required)
Learn	<ul style="list-style-type: none"> ▪ Conducts individual debriefings with external stakeholders in the region / country (if required) ▪ Attends the group learning review and communicates gaps and improvements (from a context perspective) ▪ Implements any actions assigned in the group learning review

Human resources

Role purpose: Advises on HR policy and contractual obligations; coordinates family liaison; coordinates medical and wellbeing support, monitors health and wellbeing of the CIMT, advising when rest should be taken.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Supports the strategic lead in determining whether a situation warrants the activation of the CIMT. Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> Builds a personal profile of those involved in the critical incident by collecting information on HR systems and forms in consultation with Digital. Establishes affected people's emergency contacts. Determines the need to contact the family at the early onset of the critical incident. Notifies insurers of the situation.
First meet	<ul style="list-style-type: none"> Determines who should be mobilized as family liaison(s) depending on availability, nature of the critical incident, potential family needs and diverse profile considerations. Coordinates any psychological or practical support. Agrees a stance for providing family support to those who are not identified as the emergency contact(s) of those affected. Agrees upon principles and ways of working for providing family support. Works with Digital to ensure that the identity of those affected, or family members remain anonymized. Continues to liaise directly with insurers to determine what their level of engagement will be.
Respond	<ul style="list-style-type: none"> Coordinates support provided by family liaison(s) and facilitates information flow between them and the CIMT. Provides explicit instruction to family liaison(s) about what information can be shared with families, how this should be done and when. Supports Media/Comms to ensure that any internal or external communications contain correct HR information. Ensures that logs are being submitted by family liaison(s) to Admin. Monitors the psychological and emotional impact that the critical incident has on members of the CIMT and ensures that appropriate safeguards are in place. Liaises and contracts independent psychological support services. Collaborates with insurers to arrange evacuation / relocation / response.
Close	<ul style="list-style-type: none"> Determines the need to provide (and arranges) continued psychological or practical support to individuals involved, families, the CIMT and/or colleagues. Supports the strategic lead to review final objectives, ensuring that they have been fully met. Ensures CIMT members have appropriate access to decompression leave. Addresses any employee contract issues and considers plans for re-integrating individuals involved back to work.
Learn	<ul style="list-style-type: none"> Conducts individual debriefings with family liaison(s). Attends the group learning review and communicates gaps and improvements (from a human resources perspective). Implements any actions assigned in the group learning review.

Family liaison

Role purpose: Communicates between the CIMT and families; keeps families informed of how the GI-TOC are managing and resolving the critical incident; assists in establishing the needs of families and then connecting them to appropriate support.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Same as HR
First hour	<ul style="list-style-type: none"> Familiarizes themselves with family liaison guidance if the team is activated.
First meet	<ul style="list-style-type: none"> Same as HR
Respond	<ul style="list-style-type: none"> Conducts first call / visit with strategic lead and takes over care. Acts as the sole channel of communication between the family member and CIMT. Maintains frequent contact with families by providing updates about the response and what the GI-TOC is doing to respond. Determines the practical and emotional needs of the family member and coordinates with Human resources to agree how these needs should be addressed. Records notes from any conversations or visits with the family. Conveys any concerns or issues that the family has to the CIMT. Establishes whether there are other family members, friends or relatives that require frequent updates on the response or require practical and psychological support. Advises human resources of long-term practical or psychological needs and begins to formulate strategies for exiting any support offered (e.g., steady withdrawal of support or an outsourced solution).
Close	<ul style="list-style-type: none"> Continues to provide practical support as directed by human resources. Secures all notes taken from conversations or visits with the family and submits these to digital.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from a family liaison perspective).

Admin

Role purpose: Records all information, communication and decisions; provides administrative support to the CIMT.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Familiarizes themselves with the CIMT procedure if the team is activated. Circulates the role descriptions and phase actions and the dashboards, logs, contacts and scenarios to core CIMT members. Books any meeting or other break-out rooms required. Logs and circulate any events or decisions made by the CIMT.
First hour	<ul style="list-style-type: none"> Helps security/deputy strategic lead to maintain 'first hour' dashboard. Logs and circulate any events or decisions made by the CIMT. Circulates information to the CIMT on where and when they will meet.
First meet	<ul style="list-style-type: none"> Helps security/deputy strategic lead to maintain 'after first hour' dashboard. Establishes the need to appoint a Runner as a supplementary role to the CIMT. Communicates the time and place of any forthcoming CIMT meetings.

PHASE	ACTIONS
Respond	<ul style="list-style-type: none"> Helps security/deputy strategic lead to maintain 'after first hour' dashboard. Logs and circulate any events or decisions made by the CIMT. Undertakes any other administrative tasks as directed by the Security/deputy strategic lead. Manages the Runner, if appointed.
Close	<ul style="list-style-type: none"> Logs and circulate any events or decisions made by the CIMT. Confirms to Digital which records need to be securely stored.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from an admin perspective). Implements any actions assigned in the group learning review.

Legal

Role purpose: Records all information, communication and decisions; provides administrative support to the CIMT.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> Assesses the potential legal / contract / regulatory impact of the critical incident and develops suggested mitigations.
First meet	<ul style="list-style-type: none"> Confirms which legal mitigations to implement. Advises CIMT of legal / contract / regulatory implications of decision making.
Respond	<ul style="list-style-type: none"> Advises CIMT of legal / contract / regulatory implications of decision making and best, worst, most likely and outlier scenarios. Researches and advises of any jurisdictional laws and their implications on response. Ensures confidentiality agreements with any external advisors engaged by the CIMT. Engages additional or local legal advisors (if required).
Close	<ul style="list-style-type: none"> Supports the strategic lead to review final objectives, ensuring that they have been fully met.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from a legal perspective). Implements any actions assigned in the group learning review.

Media/Comms/Digital

Role purpose: Scans the media for specific information; manages media relations and external statements; manages internal communications; provides guidance to families regarding handling the press. Guides internal information and digital security; supports the response to information and digital security incidents.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> Advises the team manager on the need to immediately communicate to the media and/or employees following the onset of a critical incident. Completes a rapid scan of public communication and media sites to determine any immediate media interest and creates report. Determines the need to appoint external crisis communication consultants. Ensures all IT and communications equipment and tools has been set up and are working. Circulates instructions to all members of the CIMT on accessing restricted files. Activates any dedicated email / other accounts to be used during the critical incident response.

PHASE	ACTIONS
	<ul style="list-style-type: none"> Assesses impact to business continuity and need for disaster recovery.
First meet	<ul style="list-style-type: none"> Determines the need to appoint additional resources to monitor media. Advises the team manager on whether the GI-TOC should adopt a proactive or reactive approach to external communication. Drafts holding and reactive communications statements / spokesperson messages. Indicates if business continuity and disaster recovery plans need to be activated. Determines how information exchanged during conversations away from CIMT meetings or via emails is captured. Ensure that confidentiality is preserved, and that the identity of individuals involved is anonymized as necessary by issuing standards.
Respond	<ul style="list-style-type: none"> Continues to write external media releases, internal communications and responds to social media posts. Briefs employees about what to say and do if they take a call from the media. Directly liaises with the media to correct or remove misleading, defamatory or false news stories. Deals with any direct calls, visits or enquiries made by journalists or other members of the public. Provides advice to family members on dealing with the media and prepares any written statements on their behalf if they wish. Writes scripts for spokespeople and advises on how to deal with subsequent questions or enquiries. Guides the implementation of the business continuity and disaster recovery plans (if activated). Assists team manager to implement a plan to mitigate any possible adverse effects of data breach / loss. Works with data protection regulators to report and manage impact of the critical situation. Continues to take measures that preserve confidentiality and anonymize the identity of individuals involved.
Close	<ul style="list-style-type: none"> Supports the strategic lead to review final objectives, ensuring that they have been fully met. Composes thank you messages for all those that responded during the critical incident. Develops internal communications messages explaining that the CIMT has been deactivated and/or the situation has been resolved. Continues to monitor the media for any post-critical incident coverage or interest. Continues relationship with data protection regulators (if required) until the critical situation is fully closed. Supports the strategic lead to review final objectives, ensuring that they have been fully met. Confirms that all records have been securely stored and gives external shared access, if required.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from a media/comms/digital perspective). Implements any actions assigned in the group learning review.

Financial

Role purpose: Guides and activates financial responses and mechanisms, as needed by the CIMT.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Familiarizes themselves with the CIMT procedure if the team is activated.
First hour	<ul style="list-style-type: none"> Assesses the level of funds required for any immediate actions that need to be taken.
First meet	<ul style="list-style-type: none"> Communicates financial policy for the critical incident (e.g., spending limits, authorization process, budget lines, etc.). Advises CIMT of financial implications of decision making, through the development of a critical incident budget. Ensures funds are available (in the right places) for all actions that need to be taken by the CIMT.

Respond	<ul style="list-style-type: none"> Ensures funds are available (in the right places) for all actions that need to be taken by the CIMT. Advises CIMT of funds required to respond to the best, worst, most likely and outlier scenarios.
Close	<ul style="list-style-type: none"> Supports strategic lead to review final objectives, ensuring that they have been fully met.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from a financial perspective). Implements any actions assigned in the group learning review.

Spokesperson

Role purpose: Acts as our external-facing representative during planned media releases or press conferences.

PHASE	ACTIONS
Activate	<ul style="list-style-type: none"> Familiarizes themselves with communications management / messaging guidance if the team is activated.
First hour	<ul style="list-style-type: none"> N/A (phase restricted to core CIMT)
First meet	<ul style="list-style-type: none"> N/A (phase restricted to core CIMT)
Respond	<ul style="list-style-type: none"> Delivers any public statements and responds to immediate questions or enquiries with the support of Media/Comms.
Close	<ul style="list-style-type: none"> Delivers any public thank you messages.
Learn	<ul style="list-style-type: none"> Attends the group learning review and communicates gaps and improvements (from a spokesperson perspective). Implements any actions assigned in the group learning review.

Phase actions

Phase 1: Activate CIMT

SER.	ACTION	OWNER(S)	COMMENTS
1	Determine if the incident needs a CIMT	<p>Strategic lead and core CIMT</p> <p>The decision to activate the CIMT must be taken by the strategic lead, always in consultation with the core roles</p>	<p>Definition of a critical incident</p> <p>An incident that has caused, or has the potential to cause, critical harm; and / or an incident that the affected person(s) believe the critical incident management team should be activated to manage.</p> <p>And thus, requires additional leadership, coordination, resources and focus outside of normal line management structures to manage its impact and aftermath (through activating the critical incident management team).</p> <p>The following are also trigger events that automatically activate the CIMT:</p> <ul style="list-style-type: none"> ▪ An affected team member requests the CIMT to be activated. ▪ An affected team member experiences critical harm, including death, threat to life or personal safety, sexual harassment or violence, major injury, kidnap, detention, harm to mental health or other serious impacts. ▪ Major operational disruption to the GI-TOC, its partners, fellows or grantees. ▪ Major loss of assets or finance. ▪ Loss or breach of data / information. ▪ Misinformation / disinformation incidents. ▪ Significant challenge to the GI-TOC's integrity, reputation and mission. ▪ Regulatory investigation. ▪ Legal action against the GI-TOC. <p>It is often the consequences of an incident, not the incident itself, that determine whether a CIMT should be activated or not. As such, consider:</p> <ul style="list-style-type: none"> ▪ Is there insufficient capacity for the incident to be dealt with through normal line management structures? ▪ Does the incident affect the GI-TOC's ability to maintain normal business operations? ▪ Are there any significant uncertainties at this stage? ▪ Does the incident involve loss of data? ▪ Will the incident generate significant press interest? ▪ Is there a direct threat to the lives of the GI-TOC's people? ▪ Are the families of those involved likely to need the support of the GI-TOC?

SER.	ACTION	OWNER(S)	COMMENTS
			If the answer to any of these questions is 'Yes', then immediately activate the CIMT.
2	Notify core CIMT of activation	Strategic lead	<ul style="list-style-type: none"> Only the core CIMT should be notified at this stage (the full composition of the CIMT should be decided at the first meeting phase). <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Capable: The GI-TOC will ensure that it has the capability to manage critical incidents by identifying experienced and willing people for each CIMT role. These people will all attend regular CIMT training.</p> </div>
3	Agree when and how the CIMT will meet	Strategic lead and deputy strategic lead	<ul style="list-style-type: none"> Agree when and how (e.g., virtual meeting room) the CIMT will meet.
4	Agree how and when the CIMT will meet	Admin with support from Digital	<ul style="list-style-type: none"> Complete and circulate the contacts book to core CIMT members. Start the logs and circulate / get online before first hour phase.
5	Create virtual meeting room	Admin	<ul style="list-style-type: none"> Create the virtual meeting room for the first meeting.

Phase 2: First hour

SER.	ACTION	OWNER(S)	COMMENTS
1	Conduct core CIMT briefing	Strategic lead	<ul style="list-style-type: none"> Brief the core CIMT on the immediate situation. Ensure core CIMT all sign an informed consent and confidentiality agreement.

SER.	ACTION	OWNER(S)	COMMENTS						
2	Develop first hour dashboard	Security/deputy strategic lead, Context and core CIMT	<p>Focus on:</p> <p style="text-align: center;">First hour dashboard</p> <table border="1" style="width: 100%;"> <tr> <td style="width: 50%; text-align: center;">What has happened?</td> <td style="width: 50%; text-align: center;">Where did it happen?</td> </tr> <tr> <td style="text-align: center;">When did it happen?</td> <td style="text-align: center;">Who is affected and involved?</td> </tr> <tr> <td style="text-align: center;">Why was the CIMT activated?</td> <td style="text-align: center;">What has been done so far?</td> </tr> </table> <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div>	What has happened?	Where did it happen?	When did it happen?	Who is affected and involved?	Why was the CIMT activated?	What has been done so far ?
What has happened?	Where did it happen?								
When did it happen?	Who is affected and involved?								
Why was the CIMT activated?	What has been done so far ?								
3	Take immediate actions to preserve life	Core CIMT	<p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Primacy of life: Whilst the GI-TOC will safeguard the ability to continue to pursue its mission and protect its reputation, finances and resources, this will never be more important than the GI-TOC's efforts to preserve the lives of team members.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div>						
4	Assess data breach / loss impact	Digital	<ul style="list-style-type: none"> ▪ Assess the impact to any data breach / loss, business continuity and the need for disaster recovery. 						
5	Set up IT systems	Admin or Digital	<ul style="list-style-type: none"> ▪ Circulate instructions to all members of the CIMT on the methods of operating i.e., file sharing. ▪ Activate any dedicated email / information channels to be used during the critical incident response. ▪ Confirm incident-specific digital and information security practices. 						

SER.	ACTION	OWNER(S)	COMMENTS		
6	Inform insurers	Human resources	<ul style="list-style-type: none"> Provide early notification of incident to insurers of the situation. 		
7	Build personnel profiles	Human resources	<p>Gather information from human resource records. Useful information may include:</p> <table border="1"> <tbody> <tr> <td> <ul style="list-style-type: none"> Emergency contact details Proof of life form Travel form (Dual) nationality information Passport, ID, residence information </td> <td> <ul style="list-style-type: none"> Blood type Existing medical conditions, routine medication taken, any allergies Record of informed consent Employment / consultancy contracts </td> </tr> </tbody> </table>	<ul style="list-style-type: none"> Emergency contact details Proof of life form Travel form (Dual) nationality information Passport, ID, residence information 	<ul style="list-style-type: none"> Blood type Existing medical conditions, routine medication taken, any allergies Record of informed consent Employment / consultancy contracts
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8	Assess immediate impact	Core CIMT	<p>Consider:</p> <ul style="list-style-type: none"> Assess the impact to individuals. (Security) Assess the impact to critical business systems and data. (Digital) Does the business continuity plan or disaster recovery plan need activating? (Digital) Assesses the potential legal / contract / regulatory impact of the critical incidents and develops suggested mitigations. (Legal) Assess level of funds required for any immediate actions that need to be taken. (Finance) Assess impact to partners, grantees, fellows and relevant others. (Context) 		
9	Assess response supporters	Security, Digital and Context	<ul style="list-style-type: none"> Contact affected individual's embassies / governments / emergency services and others to notify them of the situation and determine the degree to which they can provide immediate or long-term support. (Security) Contact involved partners, grantees, fellows and relevant others to notify them of the situation and determine the degree to which they can provide immediate or long-term support. (Context) Contact suppliers to notify them of the situation and determine the degree to which they can provide immediate or long-term support, if required. (Digital) 		
10	Scan media	Media / Comms	<ul style="list-style-type: none"> Complete and report on a rapid scan of public communication and media sites. Is there any immediate media / other interest that needs addressing? Does the GI-TOC need to appoint external crisis communication consultants? 		

Phase 3: First meeting

SER.	ACTION	OWNER(S)	COMMENTS		
1	Agree full CIMT composition	Security/deputy strategic lead, strategic lead and Context	<p>Decide what additional expertise, knowledge or resources need to be brought into the CIMT (from the optional and supplementary teams).</p> <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Available: The GI-TOC will always respond to critical incidents in a timely manner and provide continuous management until their resolution. This is achieved through incident reporting, this procedure and assigning primary and alternative representatives to each CIMT role.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Capable: The GI-TOC will ensure that it has the capability to manage critical incidents by identifying experienced and willing people for each CIMT role. These people will all attend regular CIMT training.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div> <p>CIMT members should be selected based on relevant skills, experience and personality, rather than seniority.</p>		
2	Agree roles and responsibilities	Strategic lead in consultation with core CIMT	<ul style="list-style-type: none"> ▪ Ensure that all members of the CIMT understand the expectations of their role (and everyone else's). ▪ If someone feels unsure or uncomfortable with their role, they must be clear about this. If this situation cannot be resolved, an alternative person should be found. <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Capable: The GI-TOC will ensure that it has the capability to manage critical incidents by identifying experienced and willing people for each CIMT role. These people will all attend regular CIMT training.</p> </div>		
3	Establish principles and ways of working	<p>Security/deputy strategic lead and core CIMT</p> <p>Approved by strategic lead</p>	<p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> ▪ Primacy of life ▪ Context informed ▪ Person centred ▪ Available ▪ Available </td> <td style="width: 50%; vertical-align: top;"> <ul style="list-style-type: none"> ▪ Capable ▪ Resourced ▪ Confidential ▪ Honest </td> </tr> </table> </div>	<ul style="list-style-type: none"> ▪ Primacy of life ▪ Context informed ▪ Person centred ▪ Available ▪ Available 	<ul style="list-style-type: none"> ▪ Capable ▪ Resourced ▪ Confidential ▪ Honest
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SER.	ACTION	OWNER(S)	COMMENTS
			<p>Consider:</p> <ul style="list-style-type: none"> How is the GI-TOC going to preserve confidentiality? What information does it want to disclose internally? How does it stop the spread of rumours, gossip and speculation? How important is it that the organization anonymizes the identity of those involved? (e.g., when sending emails, during meetings or writing in logs). Is there a potential need to access additional funds or other resources? Where do these need to be made available? What types of tasks and activities require approval by the strategic lead? What needs to be approved and what does not? What are the lines of communications? Does everybody report to the team manager, or are there certain functions that are managed by other roles (e.g., human resources managing family liaison officers)? Who is tasked with communicating to key stakeholders? What about liaising with external stakeholders (e.g., insurers, partners, government, etc.)? How should calls be made? Are dedicated lines to be set up? Should they be recorded? What information needs to be logged during these calls? How are emails sent and received? What security do they need? Are all emails to be captured in a certain place? Who should be copied into what correspondence?
4	Determine final objectives	<p>Security/deputy strategic lead and core CIMT</p> <p>Approved by strategic lead</p>	<p>What is the GI-TOC trying to achieve?</p> <ul style="list-style-type: none"> Write these objectives on the dashboard to remind the CIMT that these are what we are all working towards. These objectives also form the criteria for closing the CIMT or de-escalating its activities. <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p> </div> <div style="border: 1px solid black; padding: 5px;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div>
5	Establish facts and assumptions	<p>Security/deputy strategic lead, Context and core CIMT</p>	<p>Focus on:</p> <p style="text-align: center;">After first hour dashboard</p> <div style="border: 1px solid black; padding: 5px; text-align: center;"> <p>What are the final objectives?</p> </div>

SER.	ACTION	OWNER(S)	COMMENTS				
		Approved by strategic lead	<table border="1"> <tr> <td>What do we know (facts)?</td> <td>What don't we know (assumptions)?</td> </tr> <tr> <td>What have we done so far?</td> <td>What do we need to do?</td> </tr> </table>	What do we know (facts)?	What don't we know (assumptions)?	What have we done so far ?	What do we need to do ?
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What have we done so far ?	What do we need to do ?						
6	Map key stakeholders	Security/deputy strategic lead, Context and core CIMT	<ul style="list-style-type: none"> Identify all internal and external stakeholders; prioritize engagement / involvement with them depending on their level of influence on the response (or their ability to disrupt it). If complex, use a stakeholder mapping tool to understand connections and relationships. Log the stakeholders in the contacts book. <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div>				
7	Agree and assign actions	Security/deputy strategic lead and core CIMT	<ul style="list-style-type: none"> Hold a rapid discussion to identify actions that need to be immediately implemented. Assign immediate actions to CIMT roles. Ensure inclusive conversations – consider all thoughts and opinions, including the affected (if possible) <p>Guidance:</p> <div style="border: 1px solid black; padding: 5px;"> <ul style="list-style-type: none"> Discuss many solutions. Do not fixate on a single solution. Understand the risks of acting, versus not acting. Prioritize actions where the need or risks are greatest. Determine any resourcing needs (e.g., finances, people, equipment) and who can provide them. Determine supporters (Governments, insurers, partners). Determine if families, staff and others need to be notified/involved at this time. </div>				
8	Agree next meeting	Security/deputy strategic lead and core CIMT	<ul style="list-style-type: none"> Agree frequency and timing of future meetings. Follow a meet, break, meet, break cycle. Do not stay in a continuous meeting. 				

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Phase 4: Respond

SER.	ACTION	OWNER(S)	COMMENTS																																			
1	Develop scenario plans	Security/deputy strategic lead, Context and core CIMT	<ul style="list-style-type: none"> Develop best, worst, most likely and outlier scenario plans, outlining what resources would be required (and who can provide them) and what actions need to be taken. <table border="1"> <thead> <tr> <th>Scenario</th> <th>How could this develop?</th> <th>What are the consequences?</th> <th>What can we control?</th> <th>What can we influence?</th> <th>What resources do we need?</th> <th>What actions do we need to take?</th> </tr> </thead> <tbody> <tr> <td>Best</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Worst</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Most likely</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>Outlier</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	Scenario	How could this develop?	What are the consequences?	What can we control?	What can we influence?	What resources do we need?	What actions do we need to take?	Best							Worst							Most likely							Outlier						
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2	Develop and implement Comms plan	Media/Comms Approved by strategic lead	<table border="1"> <thead> <tr> <th>Do</th> <th>Do Not</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> ▪ Agree key messages (e.g., how do we shape stakeholder perceptions)? ▪ Develop multiple holding and reactive media statements. ▪ Correct false or inaccurate news. ▪ Appoint a Spokesperson who is separate from the core CIMT and brief on messages (if going public). ▪ Share any press releases with the family before they are issued. ▪ Agree how calls with the media will be handled. (e.g., what are we willing to disclose or not disclose?) </td> <td> <ul style="list-style-type: none"> ▪ Speculate or assume. ▪ Agree to give interviews or press conferences (unless as a last resort). ▪ Use contentious or complicated language. ▪ Only provide team members with updates - give them actions and directives (e.g., refrain from speaking with the media). ▪ Deliver inconsistent messages in internal and external communications. ▪ Ignore social media posts. Individually respond to them to prevent amplification. ▪ Forget to brief those who may receive calls. </td> </tr> </tbody> </table> <p>Remember:</p> <table border="1"> <tbody> <tr> <td> <p>Honest: The GI-TOC will honestly and effectively communicate with those involved in or affected by critical incidents. This includes team members, their families and all other relevant stakeholders, including regulators. However, this principle may not be applied to abductors and other adversaries when this is appropriate in resolving the incident.</p> </td> </tr> <tr> <td> <p>Confidential: The GI-TOC will uphold strict confidentiality, communicating only to the stakeholders who can help to resolve the critical incident, or those that we are required to do so, by law. The GI-TOC does this because it understands the sensitivity and criticality of information in these situations.</p> </td> </tr> <tr> <td> <p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p> </td> </tr> <tr> <td> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </td> </tr> </tbody> </table>	Do	Do Not	<ul style="list-style-type: none"> ▪ Agree key messages (e.g., how do we shape stakeholder perceptions)? ▪ Develop multiple holding and reactive media statements. ▪ Correct false or inaccurate news. ▪ Appoint a Spokesperson who is separate from the core CIMT and brief on messages (if going public). ▪ Share any press releases with the family before they are issued. ▪ Agree how calls with the media will be handled. (e.g., what are we willing to disclose or not disclose?) 	<ul style="list-style-type: none"> ▪ Speculate or assume. ▪ Agree to give interviews or press conferences (unless as a last resort). ▪ Use contentious or complicated language. ▪ Only provide team members with updates - give them actions and directives (e.g., refrain from speaking with the media). ▪ Deliver inconsistent messages in internal and external communications. ▪ Ignore social media posts. Individually respond to them to prevent amplification. ▪ Forget to brief those who may receive calls. 	<p>Honest: The GI-TOC will honestly and effectively communicate with those involved in or affected by critical incidents. This includes team members, their families and all other relevant stakeholders, including regulators. However, this principle may not be applied to abductors and other adversaries when this is appropriate in resolving the incident.</p>	<p>Confidential: The GI-TOC will uphold strict confidentiality, communicating only to the stakeholders who can help to resolve the critical incident, or those that we are required to do so, by law. The GI-TOC does this because it understands the sensitivity and criticality of information in these situations.</p>	<p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p>	<p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p>
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SER.	ACTION	OWNER(S)	COMMENTS						
3	Develop and implement family support plan	Human resources/ family liaison Approved by strategic lead	<ul style="list-style-type: none"> Coordinate support provided by family liaison(s) and facilitate information flow between them and the CIMT. Arrange strategic lead visit to family connecting them to family liaison to break the news (if required). Provide explicit instruction to family liaison(s) and strategic lead about what information can be shared with families, how this should be done and when. <table border="1"> <thead> <tr> <th>Do</th> <th>Do Not</th> </tr> </thead> <tbody> <tr> <td> <ul style="list-style-type: none"> Build trust. Families must have faith in the GI-TOC being able to competently manage the situation. Listen, listen, listen! Be empathic. Do not assume you know what is best for the family. Use clear and consistent language that is easy to understand. Call family members back when you agreed to do so, even if you have nothing to report. Be clear on boundaries. Establish a balance between what the family wants and what the GI-TOC can provide. Establish a single point of contact with the family on a dedicated line. Use human resources to connect them to specialist support. Think about exit strategies early on. </td> <td> <ul style="list-style-type: none"> Make promises to family members that you cannot keep. Be dishonest or say things that you think the family wants to hear (e.g., I am sure they will be fine). Forget that family liaison officers need support and care too. Be afraid of being the bearer of bad news. That is your role. Do it in a tactful, sensitive and empathetic manner. Open up communication with new family members, unless the original family member steps down. Do anything that would encourage family members to take matters into their own hands. If they wish to, be sure that they are aware of possible consequences and human resources is made aware. </td> </tr> </tbody> </table> <p>Remember:</p> <table border="1"> <tr> <td> <p>Honest: The GI-TOC will honestly and effectively communicate with those involved in or affected by critical incidents. This includes team members, their families and all other relevant stakeholders, including regulators. However, this principle may not be applied to abductors and other adversaries when this is appropriate in resolving the incident.</p> </td> </tr> <tr> <td> <p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p> </td> </tr> </table>	Do	Do Not	<ul style="list-style-type: none"> Build trust. Families must have faith in the GI-TOC being able to competently manage the situation. Listen, listen, listen! Be empathic. Do not assume you know what is best for the family. Use clear and consistent language that is easy to understand. Call family members back when you agreed to do so, even if you have nothing to report. Be clear on boundaries. Establish a balance between what the family wants and what the GI-TOC can provide. Establish a single point of contact with the family on a dedicated line. Use human resources to connect them to specialist support. Think about exit strategies early on. 	<ul style="list-style-type: none"> Make promises to family members that you cannot keep. Be dishonest or say things that you think the family wants to hear (e.g., I am sure they will be fine). Forget that family liaison officers need support and care too. Be afraid of being the bearer of bad news. That is your role. Do it in a tactful, sensitive and empathetic manner. Open up communication with new family members, unless the original family member steps down. Do anything that would encourage family members to take matters into their own hands. If they wish to, be sure that they are aware of possible consequences and human resources is made aware. 	<p>Honest: The GI-TOC will honestly and effectively communicate with those involved in or affected by critical incidents. This includes team members, their families and all other relevant stakeholders, including regulators. However, this principle may not be applied to abductors and other adversaries when this is appropriate in resolving the incident.</p>	<p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p>
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4	Implement business continuity plan	Digital	<ul style="list-style-type: none"> Implement the business continuity plan (if activated), focusing on: <ul style="list-style-type: none"> Loss of equipment 						

SER.	ACTION	OWNER(S)	COMMENTS
	and disaster recovery plan	Approved by strategic lead	<ul style="list-style-type: none"> ▪ Loss of temporary access to a business location ▪ Loss of permanent access to a business location ▪ Implement the disaster recovery plan (if activated) focusing on affected services, their allocated priority and maximum tolerable downtime: <ul style="list-style-type: none"> ▪ Isolate the compromised system(s) / information. ▪ Contain the effects of the compromise. ▪ Collect evidence of the compromise. ▪ Work with the data protection regulators to report and manage impact of the critical situation.
5	Provide legal advice and links	Human resources and Legal	<ul style="list-style-type: none"> ▪ Advise CIMT of legal / contract / regulatory implications of decision making and best, worst, most likely and outlier scenarios. ▪ Research and advise of any jurisdictional laws and their implications on response. ▪ Ensure confidentiality agreements with any external advisors engaged by the CIMT. ▪ Engage additional legal advisors. (if required)
6	Ensure available funds	Finance	<ul style="list-style-type: none"> ▪ Advise CIMT of funds required to respond to the best, worst, most likely and outlier scenarios. ▪ Ensure funds are available for all actions that need to be taken by the CIMT. ▪ Ensure money transfer systems meet legal requirements, including sanctions and anti-terrorism laws. <p>Remember:</p> <div style="border: 1px solid black; padding: 5px;"> <p>Resourced: The GI-TOC will ensure that it has adequate financial and human resources in place to respond to critical incidents. This includes maintaining relevant insurance and relationships with external responders.</p> </div>
7	Maintain logs and dashboard	Admin	<ul style="list-style-type: none"> ▪ Help team manager to maintain after first hour dashboard. ▪ Log and circulate any events or decisions made by the CIMT. ▪ Undertake any other administrative tasks as directed by the team manager.
8	Review the response	Strategic lead and core CIMT	<ul style="list-style-type: none"> ▪ Provide a wider perspective of actions that need to be considered to manage the impact and aftermath of the situation. ▪ Approve external or internal communications. ▪ Pre-approve actions required in preparation for best, worst, most likely and outlier scenarios. ▪ Pre-approve financial expenditure. ▪ Approve the family support strategy.

SER.	ACTION	OWNER(S)	COMMENTS
			<ul style="list-style-type: none"> Encourage a continual review of the critical incident response.

Phase 5: Close

SER.	ACTION	OWNER(S)	COMMENTS
1	Deactivate CIMT?	Security/deputy strategic lead and CIMT	<p>Refer to the final objectives developed during Phase 3 – First meeting</p> <p>Consider:</p> <ul style="list-style-type: none"> Have the final objectives been achieved? Is there still a direct threat to life or critical harm? Is it likely the situation will escalate again? Does the management of the situation still require wider engagement, beyond normal line management structures? <p>Remember:</p> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Person centred: Where practicable, the GI-TOC will ensure that affected team members have full input into the CIMT's decision making.</p> </div> <div style="border: 1px solid black; padding: 5px; margin: 5px 0;"> <p>Context informed: The GI-TOC will work with team members, partners, fellows and/or grantees who are closest to the incident to ensure that critical incident responses are guided by local and specialized knowledge.</p> </div>
2	Provide support to affected Persons	Human resources Approved by strategic lead	<p>Practical support:</p> <ul style="list-style-type: none"> There are likely multiple ways in which the GI-TOC could choose to practically support its people, their families and CIMT members. Agree these as a team. Ensure that a continued family support plan is developed and implemented. Address any contract issues and consider plans for re-integrating individuals involved back to work. <p>Consider:</p> <ul style="list-style-type: none"> Periods decompression leave / extended leave, rest and recuperation for those affected and CIMT members.

SER.	ACTION	OWNER(S)	COMMENTS
			<ul style="list-style-type: none"> ▪ Phasing any return to work or reallocating of day-to-day work (e.g., moving employee to another project or location). ▪ Compensation packages for those involved. ▪ Disciplinary action where there has been a deliberate breach of policy. ▪ Additional support from others in the organization. <p>Psychological support:</p> <ul style="list-style-type: none"> ▪ Determine the need to provide (and arrange) continued psychological or practical support to individuals involved, families, the CIMT and/or colleagues. <p>Consider:</p> <ul style="list-style-type: none"> ▪ How far is the GI-TOC willing to extend practical and psychological support – to which people? ▪ How long can support be provided? Will there be a ‘cut-off’ point? ▪ How will support be delivered? Face-to-face, remotely, through external providers?
3	Notify stakeholders	Media/Comms Approved by strategic lead	<ul style="list-style-type: none"> ▪ Develop internal communications messages explaining that the CIMT has been deactivated and/or the situation has been resolved. ▪ Compose thank you messages for all those that responded during the critical incident. ▪ Ensure Spokesperson delivers any public thank you messages (if required). ▪ Continue to monitor the media for any post-critical incident coverage or interest.
4	Create plan to address outstanding actions	Security/deputy strategic lead and core CIMT	<p>These are actions that do not require engagement from the entire CIMT. For example:</p> <ul style="list-style-type: none"> ▪ Continuing family liaison after the situation has been resolved. ▪ Completing insurance claims. ▪ Continued monitoring of the media. ▪ Revising contracts (if there has been a change in role).
5	Secure all records	Digital and Admin	<ul style="list-style-type: none"> ▪ Log and circulate any final events or decisions made by the CIMT. ▪ Confirm that all records have been securely stored and give explicit approval for these to be shared externally (if required).
6	Back to normal operations	All CIMT	<ul style="list-style-type: none"> ▪ Receive handover of normal operations, including any developments that took place during the critical incident.

Phase 6: Learn

SER.	ACTION	OWNER(S)	COMMENTS
1	Conduct individual briefings	Human resources and team manager	<p>Be sensitive about when this is scheduled and how it is delivered.</p> <p>Guidance:</p> <ul style="list-style-type: none"> ▪ The purpose of this debriefing is to get an account of what the situation was, what happened, what were the contributing factors, what can be implemented to prevent future situations and what can they or the GI-TOC learn from the situation. ▪ Ask affected persons and family members if they are able and comfortable to attend an individual briefing. ▪ Do not schedule all the debriefing sessions at the same time. It can be physically and psychologically exhausting to recall the situation. ▪ Debriefings should not be facilitated by more than two people. This provides an opportunity for those involved to disclose details confidentially and does not give them the impression they are facing a panel. ▪ It is highly recommended that the debriefers are trained in psychological first aid.
2	Conduct a group learning review	Learning reviewer and CIMT	<p>Guidance:</p> <ul style="list-style-type: none"> ▪ The purpose is to evaluate the effectiveness of the GI-TOC's preparedness and response to the critical incident (e.g., What went well? What did not go well? How can the GI-TOC increase its resilience)? ▪ This should be led by a learning reviewer who was not part of the CIMT (and is external to the GI-TOC), so that they are able to provide a wider, impartial perspective. ▪ Do not spend too much time reviewing the critical incident itself. This has been completed during the individual debriefings. ▪ All core CIMT roles must attend the workshop. It is at the discretion of the strategic lead who else from the optional and supplementary teams should attend the workshop (part of the discussions may be to evaluate the team's composition). ▪ Options should be given for CIMT members to feedback anonymously (as a separate process to this workshop).
3	Produce a learning report	Learning reviewer	<p>Guidance:</p> <ul style="list-style-type: none"> ▪ The purpose of the report is to take the learning from the individual debriefings and the group learning review workshop, to produce a concise narrative report to ensure that lessons learned are institutionally captured. ▪ Where appropriate, share with the key stakeholders. Any circulation of this report to external parties must be approved by the strategic lead.
4	Create improvement plan	Security/deputy strategic lead and strategic lead	<p>Guidance:</p> <ul style="list-style-type: none"> ▪ From the learning report, assign actions to owners and define timeframes for implementation. ▪ Agree a date when these actions are reviewed, so that the GI-TOC can evidence progress.

