

NAMFS Field Safety

Accomplishments and Path Forward

Leadership Summit Discussion Document

What NAMFS has already built - what the field is telling us - where the service chain needs to go next

A collaborative discussion that moves from completed NAMFS resources to practical guidelines, communication protocols, reporting practices, and pilot-ready implementation.

What NAMFS Has Already Accomplished

The safety work has moved beyond concept; the next step is adoption.

DONE **Safety Survey completed and summarized**
Existing member input should anchor priorities without creating another broad survey.

DONE **Safety briefing format developed**
Short, repeatable briefings can keep safety visible between full training cycles.

DONE **Safety Committee momentum established**
NAMFS has a structure to review, pilot, refine, and release safety resources.

DONE **Example job aids built**
Resources already exist for field situations such as approach, de-escalation, access limits, and law enforcement.

DONE **UNLOCKED safety-series content created**
Podcast episodes can become clips, briefing prompts, Academy content, and job-aid callouts.

DRAFT **Reporting-field concepts drafted**
Specific multi-select inspection and PCR questions have been proposed for discussion and pilot testing.

Core question: How can NAMFS help the entire service chain recognize risk earlier, communicate it consistently, and prevent repeated exposure to known hazards?

DISCUSSION: What should be adopted now, what should be piloted, and what requires additional stakeholder input?

Safety Survey Summary: From Input to Action

Use the existing summary as the source of direction, not as a reason to re-survey.

Use the summary to focus

- Common situations
- Training gaps
- Reporting gaps
- Escalation concerns
- Resource priorities

Convert themes into

- Practical guidelines
- Safety briefing topics
- Job-aid deployment
- Form questions
- Property safety flags

Avoid during Summit

- Another broad survey
- Invented statistics
- One-size-fits-all mandates
- Treating one incident as universal
- Losing small-vendor input

Targeted follow-up questions should only be used if a specific implementation gap remains unresolved.

DISCUSSION: Which summarized survey theme should become the first practical NAMFS safety guideline or reporting field?

Existing Job Aids: From Examples to Adoption

Know Before You Go

Pre-visit planning, prior flags, route, contacts, PPE

Approaching the Door

Observe, identify, maintain distance, preserve exit path

De-Escalation

Neutral language, boundaries, withdrawal, no argument

No Trespassing / Access

Signage, access limits, safe documentation, escalation

Law Enforcement Interaction

When to request support, what to carry, what to document

Safety Briefing

Short repeatable training connected to survey themes and incidents

Adoption questions: Who receives each job aid? How are they distributed? How often are they reviewed? Which ones become Academy content?

DISCUSSION: Which job aids should become official NAMFS resources first, and who should receive them first?

Safety Briefing + UNLOCKED: A Communication Engine

Existing content can reinforce the same safety message in multiple formats.

Safety Briefing

- One real scenario
- One practical decision
- One reporting reminder
- One discussion prompt
- Repeat monthly or quarterly

UNLOCKED Safety Series

- Identification, Communication and De-Escalation
- No Trespassing and Access Decisions
- Law Enforcement Interaction
- Sharing Issues Through the Chain
- Convert clips into briefings and Academy microlearning

Safety should not rely on podcast ONLY. It should feed job aids, briefings, Academy modules, and reporting examples.

DISCUSSION: Which clips or scenarios should become the first safety briefing or Academy microlearning lesson?

What the Work Has Taught Us

Field safety is not only a field-person issue; it is a service-chain issue.

Field Professional	Coordinator	Vendor Manager	Client / Asset Manager	Next Assignment
Observes risk and makes immediate decision	Receives facts and checks instructions	Reviews pattern and escalates	Sets limits and authorizes next step	Sees risk before dispatch

Breakdown point to solve: a safety concern documented once should not disappear before the next person is sent to the same property.

What currently gets lost

Warnings buried in comments, non-standard notes, platform limits, unclear escalation, and no reusable property-level signal.

What the framework should create

Structured facts, a defined communication path, safety-flag triggers, and next-visit precautions visible before dispatch.

DISCUSSION: Where does safety information most often get lost today?

Discussion Method: Real Situation to Industry Practice

Convert field examples into usable guidance and repeatable reporting.

1

Real situation

What did the field professional see, hear, or encounter?

2

Field decision

What should the field professional do in the moment?

3

Communication

Who needs to know, how fast, and in what format?

4

Reporting

Which multi-select fields capture the facts?

5

Resource

Which job aid, briefing, podcast clip, or Academy module supports it?

Every scenario discussion should produce: a practical guideline, a communication expectation, a reporting field, and a supporting NAMFS resource.

DISCUSSION: For every real situation discussed, what minimum reporting and communication should follow?

Real Situations NAMFS Can Build Around

Use recurring scenarios to organize guidance, reporting, and resources.

Pre-Approach Warning Signs	Occupant or Third-Party Contact	No Trespassing / Access Limits	Animals and Property Hazards	Law Enforcement Interaction
Signage, people nearby, access hazard, poor visibility, traffic exposure, recent activity	ID requested, verbal hostility, blocked exit, no-contact request, neighbor confrontation	Posted signs, locked gates, alternate observation, client-specific direction needed	Aggressive animals, structural hazards, biohazards, pools, ice, debris, environment	Officer involvement, direction received, report number, standby request, revisit instructions

Path forward: each real situation should map to job aid guidance, communication protocol, form fields, flag triggers, and training content.

DISCUSSION: Which scenarios need practical NAMFS guidance first?

Practical Guidelines to Validate

A short set of principles can anchor job aids, briefings, reporting forms, and training.

Safety before completion

A work order is never more important than personal safety.

Leave and escalate

Withdraw rather than confront when risk increases.

Share the flag

Safety information should travel with the property and next assignment.

Observe before approach

Use property, access, occupancy, animal, and environment cues before walking up.

Document objectively

Capture facts, not assumptions or opinions.

Pilot before mandate

Test reporting fields and protocols before broad adoption.

DISCUSSION: Which principle is missing, too broad, or needs different wording before NAMFS uses it publicly?

Communication Protocol: Who Needs What, When?

Safety communication should be simple enough to use and specific enough to act on.

Field professional

Observed facts, action taken, completion impact, and recommended precaution.

Coordinator / dispatch

Review the flag, update notes, pause redispach if threshold is met, and notify next role.

Vendor manager

Identify repeat patterns, support field decision-making, and escalate to client where needed.

Client / asset manager

Decide whether to authorize revisit, standby, no-contact instruction, or service limitation.

Timing expectation: same-day review for items that affect completion, approach, occupancy contact, law enforcement, or future redispach instructions.

DISCUSSION: Are the recipients and timing expectations realistic across client and vendor systems?

What Must Travel Forward With a Safety Flag?

The goal is not a long narrative; it is a reusable safety signal for the next assignment.

Condition	Action	Completion impact
What was observed?	What did the field professional do?	Was work completed, limited, or stopped?
Next precaution	Authority needed	Documentation
What should happen before redispach?	Does client, supervisor, or law enforcement direction apply?	Photos where safe; notes when photos increase risk.

A safety flag should answer one operational question: what does the next person need to know before they are sent to the same property?

DISCUSSION: What is the minimum information needed so the next field professional is not walking into the same unknown risk?

Reporting Practices: Specific, Structured, Multi-Select

General safety questions do not create usable safety data.

Avoid

"Was there a safety issue?"

General yes/no answers hide what actually happened.

Use

"Which conditions were observed?"

Multi-select options capture facts that can be trended.

Connect

Condition -> action -> completion impact -> next-visit precaution.

Important design rule: photos should never be required when taking them could escalate a situation. Notes may be safer than photos in confrontation, weapon, vehicle, or person-related situations.

DISCUSSION: Which fields could be added with the least system disruption while still improving safety visibility?

Exterior Inspection Form Pilot Set

Specific multi-select fields that capture observed facts and next actions.

Q1. Pre-approach conditions - select all that apply

- No observable safety concern
- No Trespassing / Private Property signage
- Occupant or unknown person present outside
- Aggressive or loose animal visible/heard
- Hazardous access: ice, terrain, darkness, blocked path
- Unsafe parking or traffic exposure

Q3. Safety action taken - select all that apply

- Completed from public right-of-way / exterior only
- Did not approach door
- Left property immediately
- Contacted coordinator / client
- Requested updated assignment instructions
- Requested property safety flag

Q2. Interaction/contact indicators - select all that apply

- No contact or interaction
- Occupant requested ID / authorization
- Occupant asked field person to leave
- Verbal hostility or threatening language
- Physical intimidation or blocked exit path
- Law enforcement contacted or present

Q4. Next-visit precautions - select all that apply

- No solo visit
- Daylight-only assignment
- Do not knock / do not approach occupant
- Confirm authorization letter / ID before revisit
- Supervisor or client review before redispach
- Hold routine dispatch pending direction

Pilot rule: any elevated-risk selection should open conditional fields for action taken and next-visit precaution.

DISCUSSION: Which inspection fields should be tested first in a pilot?

Interior Inspection/PCR Form Pilot Set

Property-condition safety fields should capture risks even when no confrontation occurs.

Q1. Property-condition hazards - select all that apply

- Structural collapse / unsafe deck, roof, floor, stairs
- Standing water / flood / active leak / suspected mold
- Electrical hazard / exposed wires
- Gas odor / fuel leak
- Biohazard / needles / medical waste
- Unsecured pool / water hazard
- Hazardous materials / environmental concern

Q3. Escalation triggers - select all that apply

- Threat / hostile contact occurred
- Aggressive animal prevented safe access
- Structural hazard prevented safe approach
- Possible unauthorized occupancy
- Client direction required before revisit

Q2. Access or occupancy risk indicators - select all that apply

- New locks or changed access condition
- Personal belongings or furnishings
- Active utilities or recent use indicators
- Vehicles / fresh tire tracks
- Unauthorized occupancy / squatter indicators
- No Trespassing / Private Property signage
- Entry blocked, unsafe, or unavailable

Q4. Work-order / PCR disposition - select all that apply

- Work completed safely
- Work completed from limited-access area only
- Work unable to be completed due to safety
- Safety flag should carry to next work order
- No photos due to unsafe conditions

Pilot rule: condition risk should inform both work-order scope and future field-safety instructions.

DISCUSSION: Which PCR fields are essential, and which could create unnecessary burden?

Safety Flag Trigger Matrix

Define what creates automatic flags, review flags, or informational notes.

Automatic flag

- Threat made
- Law enforcement involved
- Aggressive animal prevents access
- Unauthorized occupancy concern
- Unsafe structure prevents access
- Field person left due to safety

Review flag

- No Trespassing signage
- Occupant requested no further contact
- Neighbor / third-party confrontation
- Hazardous materials suspected
- Access blocked or unsafe
- Possible squatter indicators

Informational note

- Minor access limitation
- Weather caution
- Prior issue resolved
- Additional ID requested
- No elevated safety concern
- Documentation only

The matrix should be pilot-tested before adoption. Its purpose is to prevent known risk from disappearing between assignments.

DISCUSSION: What should be automatic, what should be reviewed, and what should simply stay in property notes?