

FIELD TRIP LEADERS' GUIDELINES

See Part 3 – “Field Trips” for the Policy governing the organization of Field Trips
See Part 10 – “Forms” for Release of Liability form

Field trip leaders do not necessarily have to be knowledgeable about birding, botany or other aspects of nature, since that sort of expertise is generally found among the trip participants. However, it is essential that one person co-ordinate the organization of the trip for the safety and well-being of all participants. That person is the field trip leader - and that is **you**. These guidelines are important for both your own legal protection and that of Nature Vancouver. Please read them carefully!

A. FIELD TRIP LEADER'S PREPARATION

1. Planning and publicizing the trip: A field trip may be suggested either by the person who intends to lead it, by the Society's Field Trip Coordinator or by the program organizer for one of Nature Vancouver's Sections. Details of the trip will, whenever timing permits, be posted on the Nature Vancouver website and published in the Field Trips section of *Vancouver Naturalist*. Three months or more before the intended trip, write a description of it, including an assessment of the level of difficulty, and forward it to the Field Trips Coordinator for approval. When it has been approved provide the details to the Editor of *Vancouver Naturalist*, and arrange with the Field Trips Coordinator for the trip to be posted on the Nature Vancouver website.
1. Leader's contact information: Trip leaders should provide their name, phone number and e-mail address with the description of the trip to encourage prospective participants to contact them for additional information up to the evening prior to the trip.
2. Learn about the area: Preparation for a field trip requires reasonable knowledge of the area to be visited, including an ability to describe the terrain and an estimate of the level of difficulty and the length of time required for the trip. Unless you are already familiar with the area, maps and previous trip reports can help but a reconnaissance is highly recommended, preferably with a companion who could take on the trip if you are unable to go. When studying the area consider what actions you might need to take in the event of an injury to a participant.
3. Trip difficulty rating: For risk management purposes Nature Vancouver uses a system of classifying field trips by rating their level of difficulty and adding an estimate of the time to be spent on the trail. The trip leader is responsible for deciding on the appropriate classification in conjunction with the Field Trip Coordinator. The difficulty rating system is as follows:
 - A. Easy path or road with minimal elevation change and minimal hazards.
 - B. Trail with possible rocks, roots or other hazards. Moderate gradient, occasional steep but short sections. Up to 100 m elevation change.
 - C. Moderately steep gradient. 100 m to 500 m elevation change.

- D. Constant steep gradient. 500 m to 1,000 m elevation change.
- E. Any of the above with some scrambling, use of hands or bushwacking. Not commonly found on regular day hikes but sometimes experienced during Summer Camp field trips.

The estimated time spent during a field trip should not include driving time or time spent on ferries and should be estimated to the nearest hour. The expected duration is then added to the letter category to obtain a combined letter/figure rating.

Example: A C6 hike will be a C hike, as described above, with an estimated time on the trail of 6 hours.

4. First Aid: As a matter of policy, Nature Vancouver will use its best efforts to ensure that its regular field trip leaders have taken an appropriate First Aid course, and if possible a course in Wilderness First Aid (see Field Trip Policy in Part 3 of this Binder). The cost of First Aid courses taken by experienced field trip leaders, or any member who commits to leading at least three trips, will be borne by the Society. Members wishing to take advantage of these courses should use their best efforts to take them when they are offered.
5. Changes of plan: As a field trip leader, you have the right and the responsibility to change, shorten, alter or cancel a field trip based on your judgment of the weather and any other relevant factors.
6. Documentation – Release of Liability: As a matter of policy Nature Vancouver requires that any person wishing to participate in a field trip, whether a member of the Society or a member of the public, must have read the Society's Release of Liability form and signed it in the presence of the field trip leader before the start of the trip. It is recommended that the text of the Release of Liability form be viewed on the Nature Vancouver website and read by participants prior to the start of the trip. The Release of Liability form should be printed on the front and back of the same sheet of paper and participants are required to sign on the back page with their contact details and initial the front page to verify they have read it. It is important that their signatures and initials appear on front and back of the same piece of paper. Up to 20 participants can sign each copy of the Release and more than one form may be necessary if more than 20 participants are expected. Leaders should have an adequate supply of blank forms at the meeting place or trailhead for the expected number of participants.
7. Equipment requirements: All trip leaders should consider taking such items as a first aid kit, extra water and clothing depending on weather conditions, and maps of the area. For hikes and more rigorous walks, a compass or GPS, a flashlight and bear spray are recommended. A cell-phone may be useful but coverage outside urban areas is limited. It is helpful for leaders to have a supply of bird and plant check lists for the trip area and brochures for non-members who may wish to join Nature Vancouver.
8. First time leaders: Members leading a trip for the first-time are encouraged to take an experienced member of Nature Vancouver with them. If you are unable

to find an experienced person to accompany you, contact the Field Trip Coordinator who can put you in touch with other members.

9. Special situations: For back country hikes study the guidelines for lightning and dealing with bear and cougar encounters (see Section H below).
10. Trips to the USA: For trips to Mount Baker National Forest or other US areas, consult the local US Ranger Station beforehand regarding regulations pertaining to their areas, numbers permitted in a group, and fees payable. Also ask about local emergency procedures. US bound participants must carry either passports or Enhanced Drivers' Licences and it is recommended that they be covered by health insurance for trips outside BC. Non-Canadian and non-US citizens may encounter delays in crossing the boarder and may wish to cross separately.
11. Weather: Get an up-to-date weather report and check for fire and road closures before going to the carpool point or meeting place.
12. Participation in trips by non-members: Nature Vancouver's policy is to allow members of the public who are not members of Nature Vancouver to participate in up to three field trips after which they will be requested to join the Society if they wish to participate further. Leaders are responsible for advising members of the public that they are not covered by the BC Nature liability insurance which covers members for third party liability (see Field Trip Policy in Part 3 of this Binder for further details).

B. AT THE CARPOOL POINT

1. Rendezvous with trip leader: Field trip leaders will usually go to the carpool point unless they have provided alternative directions in *Vancouver Naturalist* and on the website.
2. Rides: Arrange rides for any participants requiring them and give any necessary instructions to drivers for finding the meeting place or trailhead. Before drivers commit to giving rides they should be cautioned about the possibility of claims by passengers. If you are requested to provide a ride for a prospective participant before the date of the trip and cannot do so, try phoning other participants to arrange one. Make sure that passengers are aware that they should contribute to the driver's gas expense using the Society's rule-of-thumb method for the amount of reimbursement.
3. Checking out participants: On more difficult trips, especially those classified as day hikes, the leader should determine the level of competence of those proposing to participate. Leaders should advise persons who are not considered capable of participating for reasons of fitness, inadequate raingear or footwear, or lack of appropriate experience that they cannot go on the trip and provide the reasons for their decision. The leader's judgment in this area is critical because participation by a person who is ill-equipped or unfit can create problems for the other participants.
4. Pre-emptive actions: At the carpool point, consider whether to take any of the actions which will also be required at the meeting place, such as describing the trip, checking out prospective participants and ensuring that each participant signs the Release of Liability form. This could save prospective participants who

may not be prepared for the trip from making an unnecessary journey to the meeting place or trailhead. Impress upon participants the need for adequate boots, clothing and liquids.

C. AT THE MEETING PLACE OR TRAILHEAD

1. Leader's presence vital at the meeting place: As the trip leader you must be at the meeting place at the scheduled time. If you are sick or there is some other problem, send a substitute to either lead the trip in your place or arrange for the cancellation of the trip to be appropriately announced.
2. Introductions: Introduce yourself and let everyone know you are the leader. Welcome new members and non-members, and ask them to identify themselves.
3. Describe the trip: Outline the plan for the day, including any last minute changes. Describe the trip, including the length of the trip, elevation gains, trail conditions, significant trail junctions to watch out for and a warning about any hazardous terrain.
4. Equipment checklist: Ensure all participants have adequate footwear, raingear, water, food, sunscreen, insect repellent and personal medication if required.
5. Check out the new arrivals: Determine the capabilities of anyone who was not checked at the carpool point and turn away those not considered capable of participating for reasons of fitness, footwear gear, or experience.
6. Outline the basic trail protocols: Make sure all participants are aware that they must remain behind the leader and ahead of the designated end-person and not break away from the group unless they have advised the leader, who will ensure that they are not left alone. If they should get separated from the group they must stay where they are until they are found again.
7. Release of Liability forms: Describe the importance of the Release of Liability. Ensure that every participant in the trip has signed the Release form (see also A.7 above). Trip leaders should allow a reasonable amount of time for this procedure. It is recommended that leaders designate another participant in the trip to supervise the signing of the Release so that they can devote time to their other responsibilities. Non-English speaking participants should be assisted so they understand what they are signing.
8. Minors: Trip leaders should ensure that a parent or guardian of participants under the age of 19 signs the Release of Liability form on their behalf as evidence that they were aware of the prospective risks outlined in the form.
9. Number of participants: Do a final count of the number of participants and do a roll call if required.
10. Reduce the number of vehicles where possible: If further driving is required, limit the number of vehicles by ensuring that everyone has a ride and give instructions to drivers for finding the next meeting place or the trailhead.
11. Designation of end-person: Before heading onto the trail, designate an experienced member (preferably one who knows the trail) as the end-person and make sure they know they are responsible for ensuring that no-one falls behind

them. Advise participants to stay between the leader and the end-person. If no end-person is available, maintain voice contact with the last hiker.

12. Large numbers: If there is a large number of hikers, it may be advisable to divide the group into slower and faster parties with a leader and an end-person for each group.

D. DURING THE TRIP

1. Pace: Set an agreeable pace for the group, allowing for appropriate stops for observation and discussion. Observation of natural features is the prime purpose of our field trips, and all knowledgeable participants should be encouraged to share their expertise with others. Point out things of interest to the group
2. Rest stops: Plan for and announce periodic rest stops, if necessary, and an adequate lunch break.
3. Keep closed up: Keep the group together as much as possible. This will help with periodic counts to make sure everyone is still with the group. Minimize interference with vehicle traffic on public roads.
4. Difficult terrain: Provide assistance where necessary to ensure that participants are safely through or across any difficult terrain such as scree slopes. Make sure that participants keep well clear of those ahead of the to avoid falling rocks on steep slopes.
5. No-one must leave the group alone: Advise participants that they must notify the leader or the end-person if they are unable to continue or wish to leave the group. The leader or the end-person must ensure that anyone returning separately is accompanied by at least one other person. If anyone leaves the group to return early make sure the driver and others in the same car are aware of it.
6. Signing off the Release of Liability form: If any person leaves the group the time of their departure should be noted on the Release of Liability form and the notation should be initialed by them.
7. Return before dark: Start the return trip in good time to ensure safe arrival back at the trailhead before dark, making some allowance for unanticipated delays.
8. Switching roles: On the return trip, the leader may wish to become the end-person to sweep the route. If so appoint an experienced member to lead.
9. Final count: At the end of the trip, count heads and make sure that all vehicles can be started before departing.

E IN CASE OF LOST OR INJURED PARTICIPANTS

1. Lost participants: If one or more participants are found to be missing from the group, actions to locate them will depend on the time of day relative to sunset, the type of terrain, fatigue factors, etc. The leader, in consultation with the group, should decide whether it is possible for members to search by themselves, or whether to contact the local park rangers or the RCMP (phone 911), who may be able to alert a mountain rescue group.

2. Injuries: Persons who appear seriously injured should not be moved until an assessment can be made of the type of injury. Expert help should be brought in as quickly as possible. Meanwhile, keep them warm with extra clothing and protection underneath from cold, wet ground. If the injury appears to be of a minor nature, it might be advisable to get the person to a car as quickly as possible rather than wait for help.

F FIELD TRIP REPORTS AND RECORDS

1. Trip reports: Reports should be made of reconnaissance trips, of any trips to a new area, or of trips during which extraordinary circumstances were encountered. Reports should include any comments or details which could be of interest to future leaders. Consider writing an article about the trip for *Vancouver Naturalist* or *Discovery*. Whenever possible, post the trip report on the Nature Vancouver website.
2. Storage of trip reports and records: The Field Trips Coordinator or a designated member of the Board of Directors will maintain the field trip records including all Release of Liability forms, which will be kept for seven years. Immediately after your trip, send all records from your trip to the Field Trip Coordinator, even if the trip was cancelled or changed.

G NATURE VANCOUVER SUPPORT AND RESOURCES

1. Reports and records: Previous trip reports and maps related to your trip may be obtainable from the Field Trip Coordinator or the relevant Section Heads.
2. Consulting the Field Trip Coordinator: If you require any help or advice about your upcoming field trip, please contact the Field Trip Coordinator who will be able to put you in touch with other members knowledgeable about the area in question or who may be willing to accompany you on the reconnaissance trip.

H SPECIAL SITUATIONS

1. Lightning: Take the following precautionary measures when conditions indicate the possibility of lightning such as significant build-ups of massive cumulonimbus clouds which are the main source of lightning.
 - Stay off high places and open slopes and avoid trees
 - If exposed in a high risk area insulate yourself from the ground with anything available such as your pack. Alpine meadows can provide insulation underfoot and a dry talus slope with many air pockets can also provide insulation.
 - If someone is struck by lightning, immediately check them for injuries. Victims are not dangerous to touch.
 - If the victim has no pulse or is not breathing administer CPR right away. CPR is a combination of chest compressions and mouth-to-mouth breathing.
 - Cardiac arrest is the main cause of death from lightning strikes. Other injuries can include vision and hearing loss, tinnitus (ears ringing), memory loss, confusion and cardiac arrhythmia. Serious burns are uncommon.

2. Cougars: Cougars generally stalk from behind and may target a hiker who gets separated from the group.
 3. Bears: A bear will defend itself, its cubs or its territory if it feels threatened. All bears are potentially dangerous and their reaction to any given situation cannot be predicted. Knowledge, alertness and good judgment can help you to avoid a life-threatening encounter. The following guidelines apply:
 - Hike with a group whenever possible. If you are alone whistle, talk, sing or use a noisemaker to avoid surprising bears.
 - Stay in the open whenever possible. Avoid berry patches, animal carcasses and well-used bear trails.
 - Be alert for fresh tracks, scat, trampled vegetation, diggings, overturned rocks and claw marks on trees.
 - Do not take a dog into bear country as a dog can provoke an attack.
 - Never feed or approach a bear or its cubs. If you sight a bear make a wide detour.
 - If you encounter a bear stay calm and do not run (bears can run faster than humans). A sudden movement can trigger an attack so speak softly, back slowly away and avoid eye contact which a bear may interpret as aggression.
 - A bear rearing on its hind legs may just be trying to get your scent or a sight of you and may not necessarily pose a threat.
 - If a bear is cornered it may charge and veer away or jump forward, slam a paw on the ground and snort loudly. These are defensive actions and you should continue to back away.
 - Dropping a pack may divert the bear's attention and allow you to back off.
 - Larger grizzlies may not be able to climb trees so climbing a tree may protect you though the bear may shake the tree. Black bears climb trees.
 - If a black bear acts aggressively towards you shout at it and make yourself look as large as possible by waving your arms and stamping your feet.
 - It is extremely unlikely that you will be attacked by a bear. If you are attacked by a black bear, fight back by kicking and punching the bear and hit it on the face, nose and eyes. Do not try to fight a grizzly but drop to the ground and play dead, pulling your knees to your chest and clasping your hands behind your neck to protect it. Wearing a pack can give some protection. As a last resort lie down with legs apart and hands on your neck.
 - Bear spray lasts a few seconds but may do more harm than good.
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