



Hiking and Field Trip Handbook

Handbook

This handbook is a tool and a resource to guide you through the exciting journey of organizing, implementing, and leading a hike or field trip with the Great Old Broads for Wilderness (“*Broads*”). It is meant to serve as a portable reference for those who volunteer their time to lead *Broads*’ trips, whether they are Broadwalks, Broadworks, or other local and national events. Our trips are led by volunteers, who are sometimes without medical, wilderness, or rescue training. Many books and training courses exist to help individuals and leaders hone their skills and ensure the highest quality safety for themselves and the entire group.

It is recommended that all who volunteer to lead any *Broads* excursions familiarize themselves with this Handbook and the guidelines, policies and safety management, and emergency response information enclosed, and available from other resources.

Safety management is essential and should be infused throughout the planning process for the trip. Leaders also need to make the participants aware of any risks associated with the trip. Good trip planning and anticipating potential incidents are the best ways to prevent an emergency.

Outdoor Activities Structure

The *Broads* activities are volunteer-led and encompass activities of either: Local Broadbands, National Office Broadwalks, or Broadworks.

Local trips may be day hikes, monitoring or inventory projects, stewardship projects, birdwatching, flower identification, or other exploratory trips into natural areas close-by.

Broad volunteer leaders can have a tremendous impact in many ways when leading trips. Trips can inspire participants to take action regarding our wild places, to contact legislators to help protect a special area and to encourage people to volunteer.

Planning a Trip or Project

Purpose

Each leader must define the purpose of the field trip. The purpose could be to enjoy the outdoors, focus on conservation, or participate in something else of interest to the leader or the participants.

Trip, Participant, and Leadership Profiles

Define the trip profile-

- Decide on a location
- The type of trip (e.g. car camping accompanied with day-hiking is common)
- How rigorous will the day-hiking be
- How long it will last

Remember, Leaders hiking alone may move faster than participants. Add time for unforeseen delays (environmental and human), breaks, hydration stops, and elevation gain and/or loss. The speed of the trip should be geared to the safety of the slowest person.

Define the participant profile- by estimating how many participants can safely take part, whether they will need special outdoor skills or experience, and whether the trip will include minors. Consider the following:

- How many people?
- Will the excursion be strenuous or more leisurely?
- Are any special skills or abilities needed?

Define the leadership profile- by deciding how many leaders the trip will have, what each leader's role will be, and whether the leader(s) will need any special experience, conditioning, or equipment.

Particulars for Planning Purposes

Route Considerations

Become familiar with the route and its location. When leaders consider the route they would like to take, they should keep their field trip and participant profiles in mind. Also, check for location advisories or restrictions that might be associated with the area. Location advisories are established by local land managers either to prevent trips to an area that is fragile, overused, or politically sensitive or to encourage excursions to an area to raise awareness of local conservation issues.

Scouting

It is a good idea to scout the route. Go for a pre-visit hike and look for hazards as well as good places to take breaks, eat lunch, and enjoy interesting vistas. If scouting is not feasible, use maps, guidebooks, other leaders, local sources, and other resources to obtain as much information as possible prior to the trip. It is always best if a leader can scout the route first to reduce the likelihood of unforeseen circumstances as well as to aid in emergency action and preparedness.

While scouting a route:

- Take notes: Write down the location of and travel time to every possible point of interest, water source, alternate route, and escape route rather than just noting the intended sites and routes.
- Consider the environmental impact: What effect will the larger actual group have on the terrain and the environment compared to the smaller scouting “group”?
- Consider aesthetic values: Where are the best vistas?
- Consider the psychological effect of the sequence of sites and events:
 - It is important to note where the difficult portions of the trip are located. Do they come early or late? Are they adequately balanced with rest periods?

Group Size

Determine the appropriate group size by considering the following:

- The ability of the leader or leaders to safely and enjoyably manage a group in this terrain for this type of activity.
- Land agency restrictions and legal limits.
- The environmental impact of the group size
- The hike purpose – if it is an interpretive hike, will everyone be able to see and hear?

Route Change Considerations

When considering any changes to the planned route, either before or during the trip, be sure to consider the impact of these changes on the difficulty of the trip, participant expectations, and the safety management/emergency response plan. If a route change materially affects the difficulty of the excursion, participants must be notified, further screening and/or discussion should be considered, and the safety management/emergency response plan should be reexamined.

Permits

Make sure to always obtain the required permits for public land wilderness and/or backcountry use.

Pre-Trip Communication

Prior to the trip, a leader should contact all RSVP’s with information and offer availability to answer questions. The goal should be to ensure that potential participants understand what the trip will be like and how they should prepare. When talking with potential participants, remind them that they are required to sign an Assumption of Risk and Liability Waiver.

Minors

Minors (individuals under the age of 18) are welcome on Events with the Leader’s approval, prior to the day of the event. A separate Waiver and Assumption of Risk will need to be signed by the minor’s parent or legal guardian.

Screening

Safety is the number one priority of all trips. Obtaining a thorough understanding of the participants allows the leader to assess needs and safety concerns.

Pre-trip communication can give the leader an opportunity to screen potential participants in terms of the appropriateness of the trip. Potential participants should be screened on the basis of group and individual safety. Leaders should make reasonable adjustments to the trip to allow interested participants to attend. Screening people to prevent participation is not the goal; the goal is to determine whether the excursion is appropriate for the participant.

Participant screening is best done in advance, perhaps by phone or email or a prior meeting. Trailhead screening presents extra challenges, such as lack of privacy for sensitive discussions and lack of time for thorough discussions and decision making. Accordingly, leaders should plan on taking the extra time needed to appropriately screen participants.

The leader may want to identify anyone who has RSVP'd who has medical training.

A leader may use the following criteria to screen participants and guide them to a more appropriate trip if necessary:

- **Fitness:** Participants should be physically (including conditioning and stamina) and medically fit enough to enjoy the trip and not compromise their or the group's safety.
- **Experience:** Participants should have the technical expertise appropriate for the type of trip, such as off-trail travel, climbing, or scrambling.
- **Equipment:** Participants should have the necessary equipment to participate safely, such as food and water, sturdy footwear, hiking poles, or any other appropriate gear.

Screening and the Americans With Disabilities Act (ADA)

If a potential participant has a disability, there are additional criteria that must be considered; these are in accordance with the Americans With Disabilities Act (ADA):

- **Reasonable accommodation:** Can the person take part in the trip without Great Old Broads incurring excessive cost or expending excessive effort to allow participation?
- **Safety:** Can the person take part in the trip without endangering him- or herself or others?
- **Fundamental nature of the trip/activity:** Can the person take part in the trip without fundamentally changing the nature of the activity?

Asking Good Questions

Ask good, open-ended questions with the goal of obtaining as much information as possible. Here are some tenets of good questioning:

- Screening participants off trips is not the goal. Rather, the goal is to determine whether the trip is right for them. Consider framing the questions with "In order to assess whether this is the right trip for you, I want to ask you a couple of questions."
- Asking a few good, open-ended questions solicits more information while putting the potential participant at ease. Open-ended questions tend to be the 'who, what, when, where, why, and how' questions. They ask for more information than a simple yes or no.
- Remember, the goal is to obtain as much information as possible. Questions that generate simple yes or no answers do not provide much information. It will then be necessary to ask the potential participant many more questions, which could make both the leader and the participant uncomfortable.
- If an excursion seems inappropriate for a particular participant, make sure to discuss any concerns with the participant away from the group in a discreet manner.
- A leader should create opportunities for participants to come to him or her privately to discuss sensitive health and fitness issues.
- Asking personal questions in front of the group will likely not result in honest answers (e.g., "Does anyone here have a history of heart attacks?"; "Who has absolutely no experience?").
- Always honor the participant's dignity.

Sample Questions

Conditioning, stamina, and experience: The goal of these questions is to determine whether the trip is a good fit for participants physically. Here are some open-ended questions to help determine a participant's conditioning and stamina.

- How is your general physical condition? If you have any allergies or have had major injuries in the past, please come talk with me after the trailhead talk.
- What is your hiking [rafting/backpacking/skiing/etc.] experience?
- How often do you do this activity? If the participant has never done it before, ask, “What sort of exercise do you do to stay fit?”
- Have you done a hike of this length and duration before?

Equipment: The goal of these questions is to help ensure that participants have the appropriate equipment for the activity (and not too much). A leader should use his or her creativity to describe to newer participants the value of and reasons for appropriate footwear, raingear, etc.

- I see you are here in sandals/tennis shoes. Have you done a similar hike wearing them before? Can you describe the last you used these and how they functioned?
- Did everyone remember to pack food, water, etc.?
- Have you used this backpack [pair of boots/tent/sleeping bag/etc.] on a trip like this before, under what conditions, and how did it work for you?
- Are you used to carrying this much/little in your pack? I know that this weight in your pack is okay right now, but think how it will feel 5 miles in and 1,500 feet higher. Is there anything you would rather leave in your car to lower your pack weight?
- If leading a backpacking trip, the leader may suggest a weight limit, appropriate to a person’s stature, level of difficulty, duration, and potential weather conditions.

Steering Participants to More Appropriate Trips

It is best to get the participant invested in screening herself off a trip. The leader should paint the real challenges of the trip and how the participant’s fitness or equipment may prevent her from having a safe and enjoyable time. Here are some ways to discuss the suitability of the trip and to suggest alternative possibilities:

- Generally, this trip is more appropriate for people who are able to hike longer distances [for a longer time/at high elevations/in inclement conditions].
- I am concerned that this trip may be too long [hard/strenuous/etc.] for you and will not be enjoyable.
- Though this hike does not seem like a good fit for you, Mary is doing a great hike on Sunday that I think you might enjoy.

If the leader believes that the trip is not appropriate for the participant due to fitness, experience, or equipment concerns and the participant does not agree, the leader has the authority and responsibility to deny participation in the excursion. If possible, the leader should document this conversation. The leader should also encourage the participant to attend a future, more appropriate trip.

Medical Issues

Broads does not generally lead rigorous, remote (more than 1 hour away from a health care facility) multi-day trips, and will not collect medical forms from participants. For multi-day events *Broads* may seek information about major medical issues that might limit an applicant’s ability to participate in the event or for which *Broads* staff or volunteers may need to be aware.

Information to collect prior to event

- Hospitals: Know the locations of nearby hospitals and how to get to them.
- Ranger stations: Know the locations of agency ranger stations and if/when they are staffed.

- Phones: Determine whether cell phones work reliably in the area. It is generally not a good idea to rely solely on cell/satellite phones as a critical part of safety management/emergency response plan.
- Search and rescue: Note the contact information for the relevant providers of this service (e.g., park rangers, sheriff's office)

On overnight wilderness trips, leaders should consider completing a safety management/emergency response plan before the trip begins. This plan should include the itinerary, emergency resources, and contingency/evacuation plans. One copy should stay with the leader in the field, and one copy should stay with a family member, or a friend.

Emergency Contact Information and Participant Medical Info

Emergency contact information should be obtained from participants before the trip begins

Assumption of Risk and Liability Waivers

All participants are required to sign our standard Assumption of Risk and liability waiver. If someone doesn't sign or refuses to sign the waiver and Assumption of Risk, they will not be allowed to participate in the event.

Conducting a Trip or Project

Transportation

Consider the following when making transportation plans:

- Where is the meeting place?
- How will the group get to the trailhead?
- What to do if someone does not show? How long will you wait for them?

Carpooling

Carpooling is defined here as the use of participant-owned vehicles, or a combination of participant-owned and leader-owned vehicles, for transportation to, from, and during *Broads* trips. Such trips officially begin at the trailhead. ***Car pool transportation is at the sole risk of the participants***, both driver and passengers, even if they are the leaders of the activity. If carpooling is to occur, **the leader is responsible for ensuring all of the following:**

Participants must be advised in advance that *Broads* assumes no responsibility for car pools.

Leaders must not assign which cars participants ride in. Leaders must limit their involvement to making participants aware of who needs and who is offering a ride. (This precaution limits exposure to liability as a result of carpooling activity.)

IMPORTANT: Great Old Broads insurance policy does not cover volunteer carpool drivers, vehicle owners, or their passengers.

Unfit, Inexperienced, or Ill-Equipped Participants at the Trailhead

If the leader believes that the trip is not appropriate for a participant due to fitness, experience, or equipment concerns, **the leader has the authority and responsibility to deny participation in the trip.** Ultimately it is up to the leader to ensure that the excursion is safe and fun for all participants.

Individual Leader Roles and Responsibilities

The leader should **arrive at the site well before the rest of the group**; this helps reduce confusion on where to meet.

Leader needs to make sure that everyone who is participating in the event signs the **“Sign-In Sheet and Liability Waiver Acknowledgement” form**. This will have participant contact information, vehicle license and description, and a place to sign-out early, if needed.

All trips that involve group travel should have someone designated as a “point” and someone designated as a “sweep.” This can be any capable and trustworthy participant. The point keeps track of the route and sets an appropriate pace. The sweep brings up the rear and ensures that no participant is left behind.

It is a good idea for the point and sweep to carry a method of emergency communication, such as whistles. Also, make sure the sweep is carrying a first aid kit.

Keep track of all participants. Do a head count before the trip, during, and after the trip to avoid missing someone.

Trail Etiquette and Protocol

These are points that all leaders and participants should know before the trip begins:

- The Point is always in front; the Sweep is always at the rear. The specific person can be changed out for someone else along the way, but no one should go ahead of the Point or behind the Sweep.
- Always stop at trail junctions and wait for the rest of the group.
- Assemble the entire group at least once every 1 to 1-1/2 hours.
- Keep the trail clear when stopping for breaks.
- Tell participants that when ‘nature calls,’ inform another group member and leave their pack near the trail so the Sweep will not leave anyone behind.
- Stay on the trail, and NEVER cut switchbacks.
- Courtesy and Share The Trails with other users (hikers, bikers, pack animals, etc.)

Recommended Gear/Extra Supplies

There are many variations of the “essential” items to carry, depending on the excursion and the environment. Listed below are Ten Essentials as adapted from the Mountaineers’ Mountaineering: The Freedom of the Hills. This is a good starting list of what all participants should consider bringing:

1. Navigation equipment (map and compass)
2. Fire (matches or lighters)
3. Signaling device (whistle or mirror)
4. Sun protection (sunglasses and sunblock)
5. Insulation (extra clothing)
6. Nutrition (food)
7. Hydration (water and/or the means to purify more)
8. Illumination (flashlight/headlamp)
9. First aid kit (see below)
10. Emergency shelter (trash bag/bivy sack/tent)

First Aid Kits

All participants should bring a first aid kit. This kit is essential and should include all the items necessary to address common wilderness-based emergencies, such as wound management. A commercial kit is a fine alternative to putting together your own.

Prescription Medicine on a Trip/Pre-Trip Notification

Leaders should repeatedly and clearly notify participants in pre-trip communications of the need to carry their regular prescription medications.

Evacuation and Reporting

An incident report must be filed with the National Office when a participant has to leave the event for medical attention. This report is available at the end of this Handbook.

Food and Water Needs

Make sure the participants know whether they are responsible for bringing their own meals; most often they will be required to bring their own snacks, lunch and water. When planning the route, ensure that there is sufficient water along the trail and proper water filtration equipment is brought along. If there is not sufficient water, make sure that participants carry enough. As a leader, taking along an extra bag of GORP or a small snack is always a good idea for others who don't have enough or in case of an emergency.

Safety Management and Emergency Response Planning

Safety management is a state of mind and should be infused throughout the planning process for the trip. Leaders also need to make the participants aware of any risks associated with the excursion. Good trip planning and anticipating potential incidents are the best ways to prevent an emergency.

Trailhead Talk

1. Welcome and Introductions
2. Roles and Expectations
 - Explain leaders role, responsibility, and expectations
 - Ask participants for their expectations and concerns
3. Complete Paperwork and Waiver and Assumption of Risk
4. Conservation Message
5. Route Plan and Trail Conduct
 - Describe the day's route and travel plan
 - Designate Point and Sweep people, and rules of travel
 - Explain "Pack It In/Pack it out" and Leave No Trace
6. Safety Issues
 - Explain what to do if someone becomes separated from group
 - Describe risk for this trip
 - Make sure all participants are comfortable with the risks
 - Explain why good hydration is important
7. First Aid
 - Make sure everyone has, at least, a small 1st aid kit, or who has them
 - Describe proper foot and blister care: stop and fix a hot spot before it becomes a blister
8. Equipment and Food
 - Make sure all participants have proper gear, food, and clothing
9. Last Minute Questions

Leave No Trace Outdoor Ethics

- Leave No Trace outdoor ethics is an approach for responsible use of the outdoors that minimizes the impact of outdoor activities. The main principles are as follows:
- Plan ahead and prepare.
- Travel and camp on durable surfaces.
- Dispose of waste properly.
- Leave what you find.
- Minimize campfire impacts.
- Respect wildlife.
- Be considerate of other visitors.
- <https://LNT.org/>

Ending a Trip

- Before everyone goes home, make sure to take care of these details:
- Double check the sign-in sheet to ensure all participants are accounted for
- Distribute trip evaluations, if using them
- Invite non-members to join *Broads*. Have membership brochures available, and any other *Broads* material or trip related conservation messages
- Ask participants if it is okay for a leader and/or *Broads* to contact them in the future
- Make sure everyone has a way home
- Thank them for their participation

Emergency Response

Managing emergencies in the backcountry can be stressful and difficult.

Emergency Response Procedures for Leaders

Scene Management:

1. **STOP.** Get calm and stay calm
2. Protect yourself and your group members
4. Survey the scene (Is it safe? What happened? How many victims? Can bystanders help?)
5. Have group move AWAY from the injured person. If 911 is necessary, tell someone to call by directly using someone's name in the command: "Nora, please call 911."

Patient Care/First Aid: (Stay within your level of training!)

1. Get consent to help the patient. (Unconscious = consent)
2. Use protective barriers (gloves, breathing device, if available)
3. Check the ABCs and address life-threatening problems
 - Airway: Is the patient's airway clear?
 - Breathing: Is the patient breathing?
 - Circulation: Is there life-threatening bleeding?
4. Stabilize patient and scene and call 911 immediately, if needed
5. Do a secondary survey and record patient information (use the Incident Report Form as a guide)

Develop an Evacuation Plan

(The Incident Report Form has an evacuation plan template on the back.)

- How are you going to safely get the patient help?
- Considerations: urgency, distance, terrain, group strength, route, communication devices.
- Write down the plan.
- If your group splits up, make sure each party has identical copies of the evacuation plan.

Self-Evacuation (unaided by those outside your group)

- Never let anyone walk out unaccompanied.
- A party of four is recommended for longer evacuations (longer than one hour walk out).

Sending a Messenger Team for Help (if help is more than an hour walk away)

- Team size of four is ideal.
- Team should have necessary gear and food to be self-sufficient.
- Team should carry copies of the evacuation plan and patient report.
- The patient(s) and field group should stay in one place, so that a rescue team can find them.

Who to Call

When your group is able to communicate with the outside world, do the following:

- Frontcountry Emergencies (< one hour from help):
 - Contact the local Emergency Medical System (i.e., 911)
- Backcountry Emergencies (> one hour from help):
 - Contact the local search-and-rescue [this info should be in your Safety Management Plan], as well as the E.M.S.
 - Contact *Broads* National Office as soon as possible after the emergency has been handled with the information you collected on the Incident Report form.

On-Trip Issues

Lost Participant

If someone on a trip is missing, follow *Broads* practice for finding missing participants: A search for missing participants will not begin after dark unless there is good cause for alarm, and searching will not begin (or resume) until eight o'clock the next morning. This protocol should always be mentioned in the trailhead talk.

Such occurrences are rare and do not justify the danger to other participants caused by undertaking night searches. In any event, the missing person should understand that there are usually several hours of daylight before 8 a.m. in which to attempt rejoining the group, provided they know the way, before a search begins.

If the participant is truly lost, she should stay put and not wander from where she is located, or guess which way it is to the campsite. Hug a tree, as they say.

Problem Behaviors

During a Trip

It is important to immediately address the problem behavior with the participant. Addressing problem behaviors can de-escalate conflicts by focusing on behaviors that can realistically be modified. Diplomacy and peer pressure are effective tools for resolving these types of issues. Either way be kind but firm in stating the problem and what needs to change in order for the trip to continue. Be clear about these expectations. Pull the participant aside and speak to him or her in private, or ask someone on the trip who has befriended the person to talk to him or her. When speaking with the participant, do the following:

- Identify the participant's inappropriate behavior.
- Acknowledge and tend to his or her concerns.
- Explain and discuss that the person's behavior has an impact on the group, that the behavior needs to change, and that there will be reasonable, specific consequences if the behavior is not changed.
- Bring the participant back into the group with a sense of purpose and belonging (give the participant a task).

Removing a Participant

If all attempts to deal with a participant's problem behavior fail, **the leader has the authority to remove that participant from the trip**. Leaders should *only* do this if the participant's behavior is truly disruptive to the progress or safety of the trip.

A leader faced with such a disruptive participant should observe the following guidelines:

Ideally, do not allow a participant to leave alone.

This is a matter of safety for the participant and the protection of *Broads*. If a participant refuses to listen and decides to leave on his or her own, try to have the participant sign out and make sure another participant or leader witnesses the situation so that it is clear to all that the participant left of his or her own will. **Clearly determine whether the participant is willing or unwilling to leave the trip.**

If the person intends to leave, of her own free choice (and not in response to having been asked to leave by the leader), and it is not practical or there are no volunteers to go back to the trailhead with the participant, the leader must use judgment to assess the participant's ability to safely return to the trailhead and must later make efforts to verify that the participant returned safely. If the leader thinks the participant can make it back safely, based on an assessment of factors such as the participant's capabilities, difficulty, trail conditions, weather, etc., the leader can let the participant leave—after signing out. If the leader thinks the person's safety is in jeopardy, the leader should assertively try to dissuade the participant from leaving. If the person is determined to leave anyway, the leader should try to find a way to get the person back safely, either by finding the participant an escort or by rerouting or ending the trip.

If the person is not willing to leave and the leader cannot provide an escort, then the participant should remain, and the leader cannot insist that he or she leave. While it is the leader's right to ask the disruptive participant to leave, the leader can only force that person to leave if the leader is willing to escort the person back to the trailhead. The leader may call the *Broads* National Office for follow-up advice and assistance.

Dealing With Hostile Nonparticipants

Rarely a group may encounter people who become confrontational. Regardless of the cause of the hostility, the best course of action is to avoid any conflict and quickly distance the group from the hostile nonparticipant(s). If the group feels overly threatened during the confrontation, or if any laws or land-use regulations are violated, contact the proper authorities as soon as possible. If authorities are contacted, be sure to call and contact *Broads* National Office about the incident afterwards and they will provide follow-up advice and assistance.

Leaving a Trip Early

It is the leader's job to keep track of participants from the start of a trip to the end. If a participant wishes to depart from the group before the end, the leader must make sure the participant is signed out. Simply ask the participant to initial the "Early Sign-Out" column the Sign-In Sheet and Assumption of Risk/Liability Waiver. **In dealing with a problematic participant, they may not sign out and then sign back in later.** If the leader thinks the person's safety is in jeopardy, the leader should assertively try to dissuade the participant from leaving. If the person is determined to leave anyway, the leader should try to find a way to get the person back safely, either by finding an escort or by re-routing or ending the excursion.