

## **FIELD TRIP LEADERS' GUIDELINES**

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!

Please note that these guidelines are written for all field trips and not every item will apply to each field trip. However, all trip leaders need to be aware of the full guidelines. Check with the Sections for any field trip guidelines specific to that Section's trips.

**Related policies:** Part 3 – Field Trips  
Part 3 – Appendix A – Trip Difficulty Rating  
[Part 8 - Appendix A - Safety and Special Situations](#)  
Part 10 – Release of Liability form

### **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, Hiking and Backpacking Team Leader, Section field trip coordinators, Section program organizers or general members of the Society.

The first step is to find a field trip leader if the individual who has proposed the trip is not willing to lead it. As far in advance as possible before the intended trip, write a description of it, including an assessment of the level of difficulty, and a description of potential hazards (boulder fields, bushwhacking, etc.) and forward it to the Field Trip Coordinator for approval. When the trip description has been approved, post it on the Nature Vancouver website. The trip descriptions from the website are used for the weekly email newsletter and the *Vancouver Naturalist*, as well as for the NV Facebook page and other social media. If the trip requires extra advertising through the weekly email newsletter, such as being advertised well in advance of the trip date or included in multiple weekly emails, the trip leader should arrange this with the weekly email coordinator.

2. [The Field Trip Coordinator and/or Hiking & Backpacking Team Leader must be informed of all multi-day and backpacking trips before they are posted.](#)

Any trip involving third party operators or unusual circumstances or situations should also be approved by one of the above.

3. Leader's contact information: Trip leaders must provide their name and contact information with the description of the trip, to encourage prospective participants to contact them for additional information up to the evening prior to the trip. It is up to trip leaders what contact information they wish to provide, but it must include their email address and/or phone number. For privacy protection, contact information is not provided for Facebook postings.
4. 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. *If the trip leader has never done a particular field trip before, especially a hike, the trip should be described as an "exploratory" trip.*
5. 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 shown in Appendix A of the Field Trips Policy in Part 3. It is also shown on the Nature Vancouver website and in the *Vancouver Naturalist*. If there are any serious hazards, such as large boulder fields, substantial bushwhacking or poor trail conditions, consider increasing the difficulty of the hike by one level. Note that weather, snow conditions etc can also raise the difficulty rating of a trip.
6. 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.
7. Trip plan: For C and D level hikes, and for Overnight Trips and Backpacking Trips, it is essential to leave a trip plan with a family member or other reliable person, including destination, names of participants if pre-arranged, and estimated time of return, and to advise that person of any late changes in plans. Consider also registering a trip plan with the local Search and Rescue if available.

8. 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. Trip leaders should do their best to inform members in advance if there are changes to a field trip.
9. Cancellation of the trip: it may occasionally be necessary to cancel a field trip due to weather, other hazards, illness or injury to the trip leader or other factors. If a field trip has to be cancelled after the last weekly email has been sent out, the trip leader needs to ask the weekly email coordinator to send out a special email informing members of the cancellation.
10. Substitute trip leaders: Trip leaders are encouraged to designate another trip leader as a substitute in case the original trip leader is unable to attend the field trip.
11. Pre-registration of participants: **Overnight Trips and Backpacking Trips require all participants to pre-register with the leader, and it is also recommended for more strenuous Day Hikes, especially exploratory trips. This allows the leader to assess the abilities of potential participants and decide in advance whether the person is capable or not of completing the trip.** If registration is required, it should be clearly stated in the trip description, along with the process and any deadlines.
12. 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 or a witness 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 for single day trips must be printed as a double-sided form, not on two separate sheets of paper. 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. The Release of Liability form MUST be signed and initialled by each trip participant on every trip. Up to 20 participants can sign each copy of the Release and more than one form will 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. As much as possible, this should be done at the carpool location and not at the trailhead. Trip leaders should inform non-members at this time that they are not covered by the liability insurance.

**For Overnight Trips and Backpacking Trips, an individual form is to be signed by each participant and witnessed by a third party. This should done in**

advance of the trip; the leader will collect all forms at the beginning of the trip and keep them for the duration of the trip.

If a participant leaves the trip at any time, they should sign off in the space provided on the back of the form.

13. 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 map and compass or GPS, a headlamp or flashlight, a whistle and an emergency blanket 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, plant or other checklists for the trip area if available, as well as Nature Vancouver promotional materials for non-members who may wish to join Nature Vancouver.
14. First time leaders: Members leading a trip for the first time are required to take an experienced member of Nature Vancouver with them and must be approved as a field trip leader by the Field Trip Coordinator. New field trip leaders must meet the field trip leader qualifications (see Part 9 – Field Trip Coordinators).
15. Special situations: For backcountry hikes, study the guidelines for lightning and dealing with bear and cougar encounters in [Appendix A - Safety and Special Situations](#), available from the Field Trip Co-ordinator or Hiking & Backpacking Team Leader.
16. Trips to the USA: For trips to Mount Baker 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. It is advisable to have additional medical insurance as the BC Medical Plan covers only a small portion of any medical costs in the US. Non-Canadian and non-US citizens may encounter delays in crossing the border and may wish to cross separately.
17. Weather: Get an up-to-date weather report and check for fire and road closures before going to the carpool point or meeting place.
18. Participation in trips by non-members: Nature Vancouver's policy is to allow members of the public who are not members of Nature Vancouver or another BC Nature club 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 Part 3 – Field Trip Policy for further details).

19. Attending a field trip: The final permission for attending field trips lies with the trip leader. Trip leaders have the authority to turn anyone away from the trip, including if the person does not have the proper experience or equipment for the trip, or if the trip leader does not consider the person to be physically able to participate in the trip.

## **B. AT THE CARPOOL AND MEETING LOCATION**

1. Rendezvous with trip leader: Field trip leaders may choose to have a carpool meeting point for the trip; especially for destinations outside of Metro Vancouver and/or not accessible by public transit. If there is a carpool meeting point, the trip leader should go to that location if practicable, or arrange with an assistant to meet participants at the meeting point. Trip leaders can provide alternate directions to participants or make other arrangements for carpooling and transportation to the start of the trip. Carpooling is still encouraged as much as possible for all NV trips.

For Pre-registered trips, it's generally recommended to arrange carpooling in advance, then meet up at the trailhead or another pre-arranged meeting location.

2. Rides: Ensure all trip participants have a ride from the meeting location, and give any necessary instructions to drivers for finding the meeting place or trailhead. Make sure that trip participants are aware that they should contribute to their driver's gas expenses following the Society's carpooling costs guidelines (see Part 8 – Guidelines for Carpooling Costs or the website); however, no money should change hands until the return trip is completed. BC Nature's liability insurance does not cover riding in or driving a car on field trips; individuals are covered through the drivers' ICBC insurance.
3. Assessing participant capabilities: On more difficult trips, especially those classified as Day Hikes or Backpacking Trips, 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, and final, 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, assessing 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, food and liquids. The trip leader should also consider asking trip participants to identify in confidence if they have any medical conditions or are taking any medications, such as blood thinners, that could have an impact on first aid treatment if it was required. If trip participants require inhalers or epi-pens, they should inform the trip leader and indicate where they keep these items.

### **C. AT THE MEETING PLACE OR TRAILHEAD**

1. Leader's presence is 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, pace, trail conditions, significant trail junctions to watch out for and a warning about any hazardous terrain. This includes bear safety awareness for the trip.
4. Equipment checklist: Ensure all participants have adequate footwear, raingear, water, food, sunscreen, insect repellent and personal medication if required.
5. Assess the new arrivals: Determine the capabilities of anyone who was not assessed 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 of the protocols that you use, including if the trip leader will be in front and if there will be an end person. Make sure all participants know they are not to break away from the group unless they have permission from the trip leader. Ensure trip participants know they are to stay on marked trails and need to follow the directions of the trip leader and end person at all times. These are group trips and participants who follow their own inclinations and act as individuals should re-consider participating in a group trip.
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.12 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. The Release of Liability form MUST be signed and initialed by each trip participant on every trip.

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 behalf of the minor as evidence that the parent or guardian is 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: It is the trip leader's decision to appoint an end person, if they feel one is necessary. Larger groups should have an end person, while smaller groups may not need one. An end person should be an experienced member and can act as a co-leader for the trip. Ensure the end person is clear on their responsibilities. Ensure that the group knows the pace for the trip. If a participant does not wish to keep up with the group, they should sign off from the trip. If there is no end person, the trip leader must maintain voice contact and preferably visual contact with all trip participants.
12. Large numbers: If there are a large number of trip participants, 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 appropriate pace for the trip and group. 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. At the same time, ensure that the pace is adequate to achieve any geographic objectives of the trip. Longer trips will require a steadier pace than shorter trips. In the event that any participants do not wish to keep up with the group, they should sign off from the trip.
2. Rest stops: Plan for and announce periodic rest stops, if necessary, and a lunch break.
3. Keep close together: Keep the group together as much as possible. This will help to make sure everyone is still with the group.
4. Periodically review and make sure all participants are accounted for, particularly at important trail junctions, rough trail sections or creek crossings, and at the beginning of the return hike. This can be delegated to the end person, if there is one.

5. Minimize interference with vehicle traffic on public roads and ensure that other trail users can easily pass the group. In particular, watch for and give way to runners, cyclists and horses, for your safety and theirs.
6. 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 them to avoid falling rocks on steep slopes.
7. Leaving the group: 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 should ensure that anyone returning separately is accompanied by at least one other person, especially if a trip participant is unable to complete the trip. If anyone leaves the group to return early make sure the driver and others in the same car are aware of it.
8. Signing off the Release of Liability form: If any person leaves the group **early** the time of their departure should be noted on the Release of Liability form and the notation should be initialed by them.
9. 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. If the trip is long and daylight is a concern, ensure all participants have a headlamp or flashlight with them.
10. 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.
11. Final count: At the end of the trip, count heads and make sure that everyone is off the trail.
12. Vehicles: Ensure that all vehicles can be started and move before departing. The leader should be the last one to leave in case a tire needs to be changed, a battery boosted, or someone needs to go for mechanical assistance.

#### **E. IN CASE OF LOST OR INJURED PARTICIPANTS**

1. Lost participants: If any participants go 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. Remember that conscious patients have the right to refuse first aid treatment. If a patient does refuse offered treatment, ensure that you have a witness to the refusal. It is advised that all field trip leaders have some first aid training.

3. Incident Report: Complete the Incident Report for any incidents including missing or injured participants while the incident is fresh (a reliable assistant can help with this). Notify the Field Trip Coordinator of the incident as soon as possible.
4. Obligations: A leader, and anyone assisting, should make every effort possible to assist a lost or injured participant, to the best of their ability and qualifications. However, no one should put themselves in further danger; you're of no help to someone if you get lost or injured yourself.

## **F. FIELD TRIP REPORTS AND RECORDS**

1. Trip reports: Trip leaders are encouraged to make trip reports for all their field trips. If the trip leader is not able to make a trip report, a trip participant should be asked to do so. Reports should include how many participants, how the trip went, information which could be of interest to future leaders such as trail conditions, plus any nature information such as bird and mammal sightings, plants seen, etc. Trip reports should be posted on the Nature Vancouver website.

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*.

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 Co-ordinator, a person who has led the trip previously, or the relevant Section Heads.
2. Consulting the Field Trip Co-ordinator: 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. DOGS

Dogs are not permitted on any Nature Vancouver trips. Many people are uncomfortable around or scared of dogs, no matter how friendly the dog is supposed to be. Dogs can cause extensive damage to natural areas, harass and chase wildlife, and reduce the enjoyment of the trip for others. Dogs can attract bears, wolves and other predators.

## I. CAMPFIRES

Due to environmental impacts, safety risks, and personal health issues of participants, fires are not encouraged on Nature Vancouver trips, especially in the backcountry, unless absolutely necessary (and safe). Fires are unnecessary for cooking, hazardous in dry weather conditions, and leave scars behind in sensitive ecosystems. Collecting live wood and deadfall is damaging to the ecosystem and is prohibited in many areas.