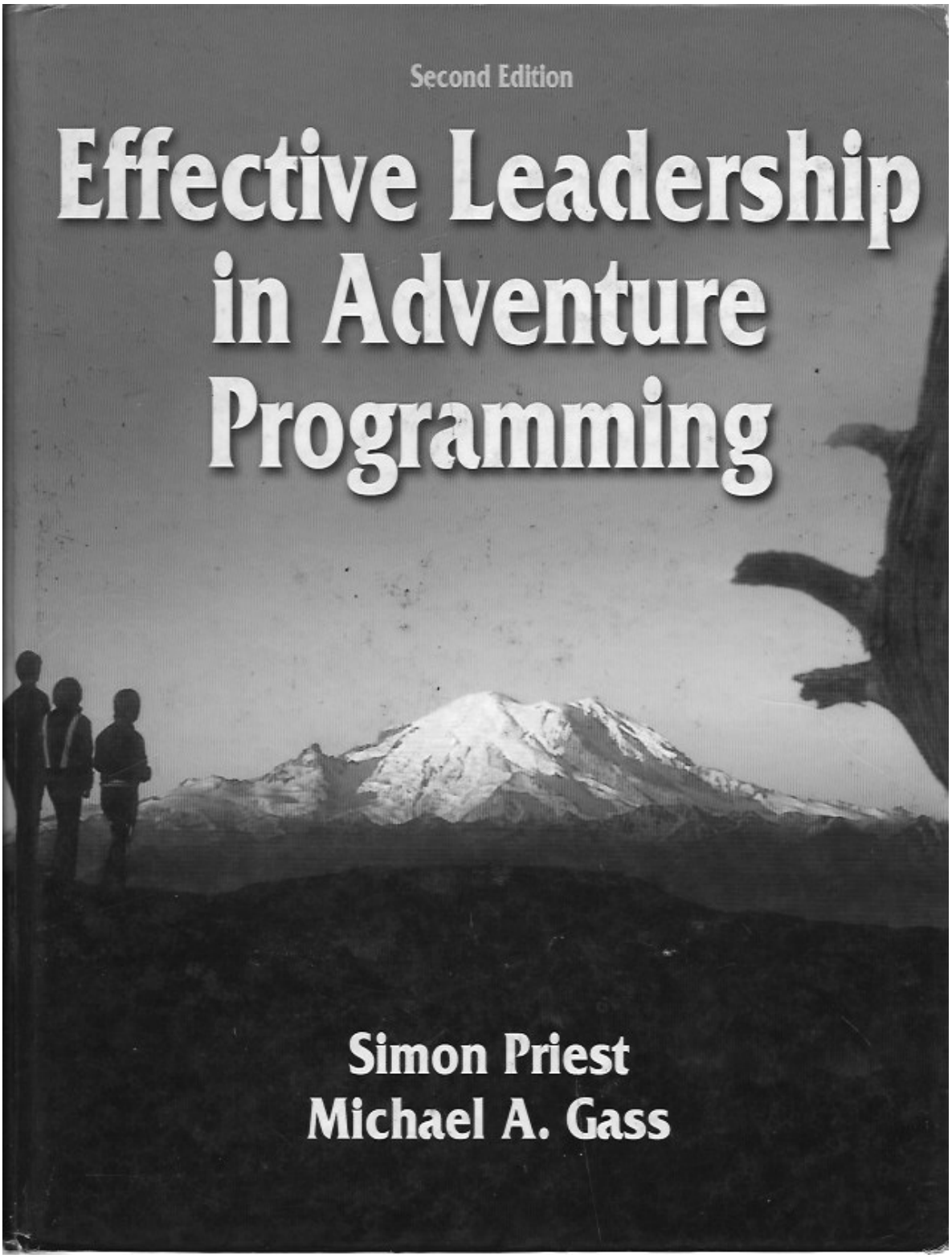
Second Edition

Effective Leadership in Adventure Programming



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CHAPTER

9

Trip Planning

As an extremely competent outdoor leader, Anthony relied on his judgment and experience to organize expeditions. He was a master of logistics, but when his group arrived at the first campsite, the tent poles were nowhere to be found. Luckily, the weather was mild and he was able to improvise poles from nearby deadwood. In retrospect, he remembered that the tent bodies and flys were stored separately from the poles in his equipment room, and he resolved to change this procedure on return. He also realized that juggling all the trip logistics in his memory had led to a forgotten item. He asked himself, "What else would go wrong?"

Relying on experience alone was an error in this case. Reserve judgment based on experience (see chapter 20) for times of uncertainty and improvisation, such as when deciding how to replace lost equipment. In situations for which the tasks are common and repetitive, such as trip organization, use checklists to reduce mistakes and the chances that you'll leave anything behind. Many of the ideas in this chapter are based on prominent practices of leading adventure programs, like those found in the *Administrative Practices of Accredited Adventure Programs* (Gass, 1998).

We have written this chapter as a checklist, and we encourage you to customize the list by adding your own local operating procedures or by changing the order of items. We also discuss planning and organization during the trip—while traveling and at camp—as well as after the trip. So let's get packing!

BEFORE THE TRIP

Generally, when planning a trip, you should consider 14 items in the following order: rationale, activities, locations, routing and scheduling, participants, groups, staffing, equipment, food and water, accommodations, transportation, communication, budgeting, and safety and risk management. Triple-check each item for any errors or omissions.

1. Rationale

The first item to consider for any trip is the reason for going. A trip should usually respond to the clients' specific needs for recreation, education, development, or therapy through adventure (see chapter 2). Next, identify and write down the purposes, goals, and objectives for the trip. You should base the remaining trip planning on these.

2. Activities

You should choose activities for their ability to meet client goals and learning objectives and to fit the trip rationale, and not because you and the rest of the staff enjoy doing them! Choose activities that are consistent with the clients' readiness within an overall program, taking into account several factors, including emotional maturity, physical skills, social development, and cognitive abilities. Pick activities that are risky enough to provide an adventurous learning experience and engaging enough to challenge participants while reducing the actual risks. Activities should fit within a progression of learning through which subsequent experiences build on previous ones. Sequence activities so that their difficulty, complexity, required preparation, and prerequisites increase over time. Consider how well these activities foster independence from you rather than dependence on you. Have backup activities in mind in case drastic weather prevents the trip from going as planned. Be prepared to change activities if risk management is a concern.

Check: Does the chosen activity match the needs established by the trip rationale? If not, modify the activity and recheck its compatibility before continuing.

3. Locations

You should choose locations for their ability to meet program goals and learning objectives, and not because you enjoy visiting those specific sites. Review locations conducive to the selected activities. Obtain information from maps, aerial and satellite photos, guidebooks, club newsletters, and other appropriate sources. Areas should feature scenery, terrain, vegetation, weather, risks, routes, and campsites that complement the needs of the trip. Compare and contrast the suitability and practicality of each area by considering the

(a) time and distance needed to travel there, (b) time and distance needed to obtain emergency services, (c) ease and cost of obtaining permission to visit the area, (d) user regulations, (e) capacity of the local environment to handle the group size and type, and (f) possible crowding or conflicts with other groups.

Select the best location and conduct a site reconnaissance, or presite investigation. This recon decreases your chance of getting lost, increases the quality of your decisions, enhances accident response, and improves participants' learning through you and your coleaders' intimate knowledge of the best teaching sites. When using recon information to plan a route or schedule times, remember that leaders generally move faster than participants and that available daylight and weather may vary with other seasons. After you have confirmed the location, secure the necessary permits and permissions to park, enter, travel, and stay overnight in the area. Be prepared to change locations if risk management becomes a concern, having backup plans in place.

Check: Does the chosen location match the needs established by the trip rationale? Is it compatible with the selected activities? If not, modify the activity or location and recheck compatibilities before continuing.

4. Routing and Scheduling

Map a route connecting places of interest, such as teaching sites, camps, and viewpoints. In doing so, consider the route length, daily distances, available campsites, access and egress points, best direction to travel, order of site usage, and escape routes, including for inclement weather, injurious accident, or getting lost. Build in contingencies, such as rest days, long breaks, obstacle delays, shortcuts, and side trips. For example, plan a canoe circuit so that you can drop extra loops from the route if the group is delayed or add loops if the group is ahead of schedule.

Determine the trip duration, then select from available dates. Prepare a flexible itinerary. Often, it helps to work backward from the expected time of return. Calculate times for travel on all routes, including driving time to and from the trip area. Consider the influence that the following will have on travel speed: distance, terrain, elevation change, route width and linearity, route conditions, vegetation cover, weather, temperature, season, time of day, available daylight, group size, pack weights, and participant fitness or competence. Although the group may not stick to the route or schedule, this itinerary can guide adjustments, since performance during early days often dictates changes in expectations in later days.

Check: Do the chosen route and schedule match the needs established by the trip rationale? Are they compatible with the activities and location? If not, modify the routing, scheduling, activities, or location and recheck their compatibilities before continuing.

5. Participants

Since the overriding concern in any adventure program is the participants' needs, you should check that the participants are sufficiently prepared for the activities, locations, routing, and scheduling. Do not accept participants unless they meet the criteria, carefully considering, for example, those who may be forced into the trip by a program eager to fill vacancies.

Consider whether these prerequisites provide appropriate criteria for participant acceptance: the completion of prior courses or tests, such as a swim test before canoeing; emotional and social maturity, such as compatibility with others or attitude toward the environment; health and fitness, including strength, flexibility, balance, agility, coordination, and cardiovascular endurance; and competence, including ability, skill, experience, and confidence. If appropriate, arrange for pretrip training and informational sessions in similar settings to eliminate any weaknesses in technical, risk-management, or environmental skills. Also consider the participants' number, planning for a range and expecting a few to add or drop; gender and ages, recognizing that legal restrictions may apply; interests, striving to correlate with motivation and energy; and special needs, disabilities, or medications.

Ensure that participants are well-informed before the trip. Provide written information well in advance and offer an orientation meeting when appropriate; you may wish to invite the parents or guardians of child participants. In the written information, include program philosophy, trip details, and any prerequisites or preparations that prospective participants should complete. In orientation meetings, introduce leaders and other participants. Explain the trip's activities, nature, reason, and purpose. Address potential fears by openly discussing risk-management procedures and possible risks. As other trip details become

available, pass them on to participants by mail, phone, fax, e-mail, or another meeting.

Distribute, complete, and collect important paperwork, such as legal or medical forms. Recommend additional personal accident or medical insurance to those who need it. Screen participants' health histories, having participants with health issues, such as cardiac concerns, undergo an appropriate medical exam or seek a physician's permission before their involvement. Pay close attention to participants at risk for a heart attack, such as those who have a personal or family history of attacks; have high blood pressure; are over 40; are obese, smoke, or are sedentary; and if in doubt, consider preventing their participation.

Designate and inform participants of a responsible contact person who will act as an intermediate between the group members and their friends and family. If the group is overdue, it can let the contact know about the delay, and concerned family and friends can phone the contact to get the latest news.

Check: Do the participants match the needs established by the trip rationale? Are they compatible with the routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

6. Groups

Pick group size to maximize learning opportunities, optimize relationships among members, and minimize environmental impact. Typical groups range from 6 to 16, averaging about 10 or 12. Bigger groups are generally more difficult to supervise or manage, allowing some members to hide in the crowd. Smaller groups generally have fewer interactions to generate valuable dynamics. Groups may be restricted to as few as 4 to 6 people in some heavily used areas to protect nature. A minimum size of four makes sense in case of an injury. While one person stays with the injured, two others can go for help. Sending two people for help is good in case one gets injured on the way out.

Once you have formed groups, outline the ground rules and regulations, overview the routing and scheduling, detail probable dangers and risk-management procedures, discuss possible environmental impacts, distribute food and equipment lists, and assign roles or duties for the trip. Plan for plenty of time to allow the group to form (see chapter 5) and to appropriately facilitate experiences.

Check: Do the groups match the needs established by the trip rationale? Are they compatible with the participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

7. Staffing

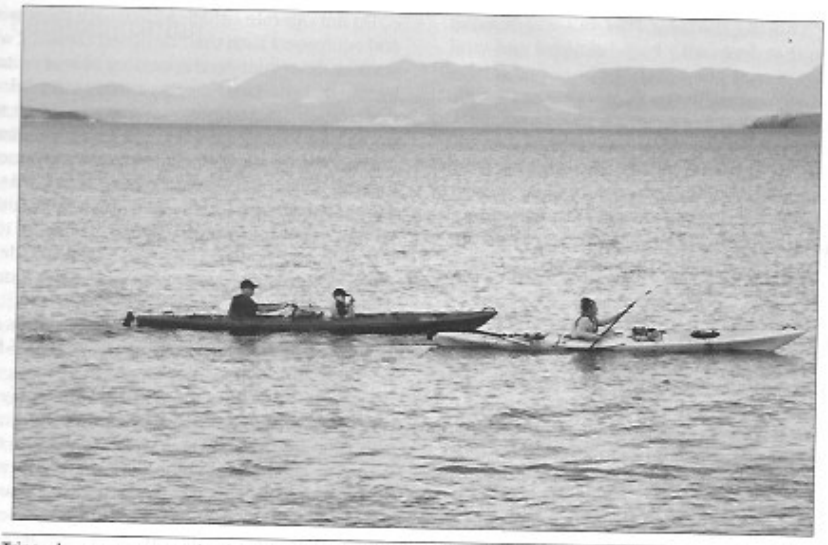
Select a staff that works well together under all expected conditions, including adverse ones. Maintain an acceptable leader–participant ratio. This ratio will vary according to the risk expected on the trip, the competence found in the group, and the purpose of the outing. To start with, a minimum of two leaders per group is good. This permits you to bracket the group with one of you scouting at the front and the other sweeping up the rear. In an accident, if the victim is a leader, another leader remains to take control and respond as needed.

Designate leaders and assistant leaders for each group, then clarify their roles to prevent conflict that can polarize or split the group. As a leader, you must see the bigger picture and take overall responsibility. Your assistants should attend to smaller details and fill in the missing pieces. You oversee the tough decisions, while assistants serve as a valuable sounding board for ideas. For example, you should typically oversee emergency situations while your assistants deliver messages, monitor the victim, supervise the remaining group, or accompany the victim during evacuation. If you share leadership, agree on roles and responsibilities well in advance of the trip. Of course, you must communicate effectively during the adventure as well.

Check: Do staff members match the needs established by the trip rationale? Are they compatible with the groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

8. Equipment

Prepare three equipment and clothing lists: individual, group, and risk management. On the individual list, include not only items to bring but also those not to bring, such as watches, hair dryers, loud radios, drugs, and alcohol. Check that partici-



Trips where one way or circular routes are possible present a whole set of considerations not found in two way or return trips.

pants have the right gear, especially clothing and other appropriate essentials. Have them bring in their own equipment to inspect it and determine proper fit. Explain the layering concept to participants, then check that they have adequate layers (wicking, insulating, and protecting) for both average and worst conditions.

Obtain and inspect group equipment. Decide what pieces of equipment you and your coleaders will carry. Remember to carry extra food and spare clothing for emergencies. Divide the remaining gear among group members by considering their relative fitness and available pack space as well as the weight and volume of the equipment. People may wish to weigh their packs to ensure that they carry less than a third of their body weight. Obtain specialized equipment, such as that needed for canoeing or mountaineering, and teach participants during the pretrip training how to use such equipment. Keep abreast of innovations in outdoor equipment in order to better inform participants of what works and what does not.

Check: Do the equipment lists match the needs established by the trip rationale? Are they compatible with the staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

9. Food and Water

Count the total number of meals and categorize them as breakfasts, lunches, dinners, or snacks. Prepare a menu for each meal in each category. Consider the nutrition, taste, palatability, perishability, cooking ease, and cleanup for all meals. Keep in mind the number of stoves and the amount of fuel required to prepare the meals. Recognize that melting snow, cooking at higher altitudes, or boiling without a pot lid will all require more time and fuel.

For each meal, calculate the amount of food needed to feed the participants in each group. Combine these menu contents into a single shopping list. Purchase this food and then repackage it to minimize waste (remove food from cardboard boxes and place in reusable ziplock bags, empty contents from glass containers and place into reusable plastic containers, and so on). Label and distribute food among group members. Try to keep a single meal's contents together with the same person. If the total volume or weight is extreme, consider arranging a food drop or cache at one or more points during the trip.

Decide on water purification. Boiling requires extra fuel and time to purify. Chemical treatments involve iodine tablets or crystals, of which some

people do not like the taste. Filtering may demand a system that deals with both bacterial and viral components, and good systems are often expensive and occasionally troublesome. Carry sufficient water at all times—extra for arid areas.

Check: Do the food and water provisions match the needs established by the trip rationale? Are they compatible with the equipment, staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

10. Accommodations

Accommodations can range from hotels, such as on the road to and from the trip location, to huts and shelters in more popular and less wild areas to campsites, which are the norm for most backcountry outings. Some of these facilities may require advance reservations and can cost money. Book and pay for obligatory accommodations in advance.

Check: Do the accommodation arrangements match the needs established by the trip rationale? Are they compatible with the food, equipment, staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck their compatibilities before continuing.

11. Transportation

Traveling to and from the trip site is usually the most dangerous aspect of any outing. Therefore, focus on risk management for all transportation. Arrange for transport vehicles, taking into account insurance requirements, shuttling services, and parking arrangements. Keep photocopied records of all drivers' licenses and any rental agreements. Have staff take a defensive driving class.

Ensure that drivers are correctly licensed for the vehicle and number of occupants they drive. Be certain they are experienced at driving and backing up the vehicle and any trailer that may be attached. Give them a map, directions, and a list of meeting places, making sure these places have phones for reaching the contact person if a delay occurs. Remind them of the rules of the road (e.g., wear seat belts, obey speed limits, make frequent rest stops) and of what to do in case of a traffic accident. Decide whether several vehicles will travel independently, catching up at meeting places, or together in a convoy.

Do not operate vehicles filled with more people and equipment than their designed capacity, which you can determine by the number of seat belts and by the manufacturer's carrying capacity information. Require passengers to wear a seat belt while the vehicle is in motion. Do not allow passengers to distract the operator of the vehicle while in motion. Consider using headlights during the day as well as at night. Have guidelines for diminished driving conditions; for example, if visibility is limited to less than 100 yd (91 m), the driver pulls the vehicle over at the first appropriate spot, turns on the four-way flashers, and waits until visibility increases. Rotate drivers to reduce fatigue. For example, do not allow anyone to operate a vehicle for more than 5 h at a time or for more than 3 h if the operator was vigorously active for more than 8 h that same day.

Check that all vehicles contain the correct equipment, such as first aid kits, repair tools, fire extinguishers, chains, flares, reflectors, and spare tires, and check that attachments, such as roof racks, hitches, trailers, lashings, and equipment, are secured. Make sure staff members know how to use the equipment, such as how to use it to correctly change a tire. Stow any gear carried inside the vehicle so as to avoid creating projectiles in a crash situation. Before the trip, check tire pressure, lights, fluids, brakes, belts, cables, hoses, and gauges, and discuss loading, unloading, and onboard rules and risk management with participants and staff. Count heads before leaving any meeting place.

Unload and load the vehicle in an orderly fashion. Have appropriate protocols for loading, such as allowing only two people to load or unload the roof rack at any one time. Unload vehicles on the side of the road only in an emergency; try to unload or load in parking lots or on appropriate side roads.

When parking vehicles, remove all valuables, leave nothing in view, and place the vehicle out of the way of other vehicles. Decide whether to hide keys nearby or take them along. A spare set of keys permits both options. When shuttling, attempt to leave at least one vehicle at each end of the trip so that a retreat, such as one due to weather or accident, places a vehicle at your disposal.

Check: Does the transportation match the needs established by the trip rationale? Is it compatible with the accommodations, food, equipment, staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck compatibilities before continuing.

12. Communication

In the event of a serious accident, communication with outside medical expertise is critical. Communication can range from CB walkie-talkies or radios with dedicated frequencies to cellular phones to sending people out to get help. When other forms of communication fail, the latter is an excellent fallback option. Unless the group is very small, try not to send only one person for help in case that person is injured while alone.

Communication may also be useful for getting up-to-date information about weather or fire dangers, for breaking a large group into several smaller subgroups, and for changing outside arrangements, such as pickup times and places. When choosing communication, consider cost, including monthly rental and annual licensing fees; maintenance, including replacing parts or recharging batteries; limitations, such as line of sight versus repeating stations; function, including the possibilities of loosing connection or freezing up in cold weather; and care, such as battery life or moisture encroachment. Above all, ask, "Are the batteries charged?"

Note that easy access to the outside world can severely reduce the wilderness state of mind common to many outdoor adventures. Ready contact can also encourage groups to overextend themselves, confident that these communications will help them. You may wish to not announce the possession of communications as well as have communications fail once in a while!

Check: Does communication match the needs established by the trip rationale? Is it compatible with the transportation, accommodations, food, equipment, staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck compatibilities before continuing.

13. Budgeting

Budget for vehicle costs, including rental, gasoline, oil, tolls, extra mileage, shuttle drivers, and parking; food per person per day; equipment, including purchase, rental, and repair; permits, including camping and user fees; staff costs, including salaries, benefits, and personal expenses; and miscellaneous, such as advertising, facility rental, maps, telephone, and faxes. Balance these expenses against any expected income. Since the number of participants can fluctuate, build in an appropriate buffer to account for that extra person who might necessitate renting a more spacious vehicle or hiring an extra leader. Always have enough spare cash to pay for expenses during the trip and carry a credit card for unexpected emergencies.

Check: Does the budget match the needs established by the trip rationale? Is it compatible with the communication, transportation, accommodations, food, equipment, staff, groups, participants, routing, scheduling, activities, and location? If not, modify the appropriate trip components and recheck compatibilities before continuing.

14. Safety and Risk Management

Complete a risk-management plan for every trip, possibly including (a) a brief educational rationale; (b) specific details on the activity times and places, a proposed itinerary with anticipated dangers and expected countermeasures, a route map with escape plans, and emergency contact numbers, including police, hospital, and rescue; (c) a summary of participant qualifications, health information, and completed emergency contact and next of kin forms for staff as well as participants; (d) signed legal forms; (e) an expense budget; (f) locations of nearest phones, medical facilities, and important emergency agencies and their phone numbers, including search-and-rescue services and the nearest park service office; (g) appropriate information, systems, and forms for staff when it needs them, such as search-and-rescue procedures, missing person reports, crisis and fatality response forms and guidelines, and accident incident response forms and guidelines; (h) blood-borne pathogens handling procedures; (i) alcohol and drug policies; (j) media and information dispersal instructions; and (k) individual, group, and risk-management lists of clothing and equipment. Obtain the necessary approval from the supervising organization and double-check insurance coverage for all aspects of the trip.

Leave copies of the plan with the designated contact person who will inform the authorities, respond to inquiries from participants' families and friends, and take necessary actions if the group is overdue or in trouble. Give a copy of the plan to each leader on the trip as well.

Check: Do the safety and risk-management plans match the needs established by the trip rationale? Are all 11 pieces (a-k) of information included in the plan? Are they compatible with the budget, communication, transportation, accommodations, food, equipment, staff, groups, participants, routing, scheduling, activities, and location? If not,

modify the appropriate trip components and recheck compatibilities before continuing.

Triple-Check

Immediately before departure, get the latest weather forecast or tidal charts and check the local conditions for icy roads, muddy trails, river flow rates, snow depth, and the like. Encourage participants to telephone one another to prevent oversleeping their alarms. Let them determine their own car pool arrangements to the initial meeting place.

Double- and triple-check: check all 14 steps forward and backward. Is everything compatible? Make the final decision to go or alter, adapt, abandon, or abort the trip! Last, establish and continually refine criteria for determining if the plan needs changing in midstream. Stay flexible!

DURING THE TRIP

While on the trip, you hold responsibility for the risk management of your groups and for balancing this risk against the groups' inevitable impact on nature and against the learning that comes from encountering risks. Attend to these concerns in order of priority: risk management, nature, learning, enjoyment, and completing the trip as planned.

Trying to stick to a route or time schedule is one of the major causes of fatal accidents. You must be prepared to alter, adapt, abandon, or abort a trip according to your judgment. Participants enjoying themselves is an added bonus on any trip but not if it is at the expense of learning, nature, or safety!

When it comes to learning, you must ensure the participants' receptivity, recognition, response, and reflection (Priest, 1988). To create learning opportunities, set behavioral learning objectives that are within the reach of each participant. Preparing ahead of time, including holding pretrip sessions on terminology and basic concepts, may be appropriate. Keep activities exciting and enjoyable to motivate participants. Keep participants well fed and watered and at stable body temperatures. When clients aren't cold, hungry, hot, or thirsty, they are receptive to learning. Keep an eye on group development and how it influences group and individual behavior.

Reflection is a key component in a client's learning progress. Build in plenty of time for reflective debriefing discussions and implement some other forms of reflection, such as writing in a journal, discussing in pairs or trios, drawing, painting, dramatizing, composing poetry, telling stories, dancing, or soloing (self-introspection).

When it comes to nature, you must protect the environment. This means clearly communicating appropriate behaviors, such as respecting private property, not littering, staying on trails, avoiding shortcuts on switchbacks, and traveling quietly so that others might see wildlife. Consider the area's carrying capacity by using stoves instead of fires, not creating new campsites, burying sanitary wastes in the topsoil layer, sharing resources with others, leaving no trace, and cleaning up the mess left by less considerate users.

When it comes to risk management, you must ensure the health of participants. This means continually monitoring weather, terrain, route, and participants' locations, body temperatures, morale, and energy. Make sure everyone knows where the accident response kit (ARK) is kept. Conduct ongoing danger assessment and accident analysis. Brief participants on impending dangers. Examine dangers by scouting rapids, digging avalanche pits, or crossing rivers before participants. Immediately stop any inappropriate actions, such as horseplay. Anticipate inappropriate actions that may occur when an initial explanation may not have been clear to some people.

Traveling

Frequently count heads while traveling on trails, over open water, down rivers, into caves, or across mountain slopes. Before beginning activities, discuss with participants what to do in emergencies, such as if they're injured or lost, and conduct stretching or warm-up sessions to prevent injuries and reduce the potential for fatigue. As people begin to exercise they can get warmer, so plan an early stop to adjust clothing. Before beginning, share with clients how the route is marked, whether by tree blazes, paint spots, metal signs, or rock cairns, and what special markings indicate junctions or changes in direction.

Review the first leg while participants follow along on their own maps. Remind them what to do if they become lost or separated from the group. Use a buddy system when appropriate, such as pairing weak participants with strong, and encourage participants to keep tabs on their buddies while traveling. Instruct participants to leave their packs or some other item on the route in plain view if they leave the route for any reason, such as photography or sanitation needs.

Discuss sanitation procedures. Model desirable behaviors, such as picking up litter and not taking shortcuts.

Pace the group by traveling at the speed of its slowest member. Develop a group consciousness about accommodating varying speeds of members by placing slow people near the front, fast people at the back, and redistributing carried loads. Travel single file unless route conditions permit different configurations. Keep the group between a designated scout (first group member) and sweep (last member), having ways to communicate if a stop is needed. For example, have scout and sweep stay close enough to see each other or call one another by whistle or voice.

Rest regularly to recover breath, adjust clothing, eat and drink, gather the group together, discuss the previous leg, plan for the next leg, or view scenery. At rest stops, allow all your clients time to rest and do not strike out on the next leg until the newest arrivals are rested. Perform a site check of the area, counting people, looking for dropped gear, or rechecking for litter before leaving.

Break large groups into smaller ones, maintaining reasonable spacing and contact between subgroups. Assign a scout and sweep to each subgroup and give each subgroup appropriate equipment, such as a first aid kit, spare rope, or radio. Stagger subgroups through obstacles and dangers, such as rapids, avalanche slopes, and river crossings, so that they may assist one another.

Stop at trail intersections or places of possible confusion. Count heads before continuing. When appropriate, such as in a well-known area with a competent group, leave one person at each intersection to wait for the next person. On arrival, that next person waits while the other continues. You and your coleaders can then move throughout the line, taking different positions in the group, alternating scout, sweep, and observer roles. Each position has its pros and cons.

Scout from the front when finding the route is difficult, when you expect danger, or when a runaway group needs holding back. Be aware that a front position, however, can cause the group to become too dependent on you, lose track of where it is, or be unaware of existing dangers. It may also lose motivation if a scouting leader exerts too much control.

Sweep from the rear when the group spreads out, when tired or straggling members need extra motivation and encouragement, or when others might benefit from navigating at the front. Be aware that a rear position, however, can cause the group to become too independent of you, allowing some members to get far ahead or even lost or into other trouble. They may be frustrated by too little control from a sweeping leader.

From the front or the rear, you may have difficulty seeing what is going on in the group. Observe from the middle when noting group interactions, such as cliques or conflicts; when checking on participant health concerns, such as fatigue or temperature; or when encountering difficult obstacles, such as avalanche slopes or river crossings. The middle position allows you to move freely and unobtrusively through the group as well as to be relatively close to everyone in the event of an accident. As an observer, you can also stop at any obstacle and assist or advise participants as they pass it. When in the middle, be careful not to let members spread out too far ahead or too far behind.

Camping

Select a campsite based on the following conditions:

- Environmental appropriateness, following the Leave No Trace organization's guidelines (see chapter 8)
- Flatness, remembering that a slight incline may be desirable
- Risk-management concerns, avoiding avalanche zones or hanging dead branches
- Drainage, not digging any trenches
- Surface, not damaging vegetation or moving soil
- Lack of insects, keeping in mind that a breeze can discourage them
- Proximity to water, not coming so close as to pollute it
- Protection, using trees for shelter from rain or wind
- Shade or sunshine, noting the direction of sunrise and sunset
- Aesthetics or scenic views
- Proximity to other groups who may detract from your group's need for solitude and privacy

Double-check that tents are correctly situated and erected to shelter participants from the elements.

Identify dangerous areas to avoid. Designate procedures and places for food storage, cooking, eating, and disposal and for sanitary concerns.

Encourage people to use flashlights as night falls. Manage gear by keeping the campsite tidy and organized, especially before going to bed. Disorganized equipment can be lost if covered by overnight snow. If possible, hang extra food between two trees well above ground to avoid animal inquiry and avoid taking food into the tent when in bear country. Clean up on departure and pack out all trash.

Difficult Conditions

Effective leaders normally keep an eye on their back routes by frequently looking behind. They often do this in case the forward passage is blocked and retracing steps becomes necessary. In selecting routes, consider the dangers of traveling in dry canyons prone to flash flooding, river valleys with obligatory crossings, mountain ridges with cliff bands and lightning hazards, snow slopes with avalanche or slips potential, glaciers with serac or crevasse movement, and scree slopes with rock fall or a high chance of twisted ankles.

If traveling at night, carry emergency lighting, wear eye protection for unseen sharp branches, wear reflective clothing if helpful, and plan for diminished vision. In reduced visibility, such as under fog or in a snowstorm, familiar terrain can quickly become unfamiliar and supervising a group can be extremely difficult. In appropriate circumstances, rope the group together to prevent separation. On poorly indicated routes that may occur in reduced visibility and when marking is sparse, let a route finder go out on a rope, looking for the next marker, while the group waits at the last known marker. If the next marker is found, the group can follow the rope and leave the security of the last marker. You should have the group repeat this process until the situation changes for the better.

BACK HOME AND OTHER PLANNING

Evaluation is valuable, and you should plan for it in advance rather than leaving it to the last minute. Provide opportunities for participants and coleaders alike to give you written and verbal feedback. Prepare a written report from the evaluations

◄ EFFECTIVE OUTDOOR LEADERS ►

- Are familiar with trip planning. Planning procedures typically include rationale, activities, locations, routing and scheduling, participants, groups, staffing, equipment, food and water, accommodation, transportation, communication, budgeting, and safety and risk management.
- Write risk-management plans, covering the following:
  1. A brief educational rationale
  2. Specific details on the activity times and places, the proposed itinerary with anticipated dangers and expected countermeasures, a route map with escape plans, and the emergency contact numbers (e.g., for police, hospitals, rescue services)
  3. A summary of participant qualifications, health information, and emergency contact or next of kin forms, completed for staff as well as participants
  4. Signed legal forms
  5. An expense budget
  6. The location of the nearest phones, medical facilities, and important emergency agencies (e.g., search-and-rescue services, park service office) and their phone numbers
  7. Appropriate information, systems, and forms for staff (e.g., search-and-rescue procedures, missing person report forms, crisis and fatality response forms and guidelines, accident incident response forms and guidelines)
  8. Blood-borne pathogens handling procedures
  9. Alcohol and drug policies
  10. Media and information dispersal instructions
  11. Individual, group, and risk-management lists of clothing and equipment
- Are practiced in these procedures so that trip planning flows smoothly and the trip proceeds appropriately.

composed of a summary of what took place, being especially sure to note deviations from the original safety and risk-management plan and any recommendations for changes next time. Complete any additional paperwork, such as accident and incident reports.

Wash, dry, and return equipment after the trip. Appropriately dispose of leftover food and equipment. Return vehicles. Balance the budget and submit receipts or remaining moneys. Last, plan a reunion, perhaps a potluck dinner with a video or slide show, or a follow-up meeting.

For this checklist, we have purposefully omitted those aspects of programming that are not necessarily a leader's responsibility. For example, advertising or marketing and the financial or fund-raising tasks typically fall to program administrators. Hiring staff, budgeting, and using computers are roles for administrators, programmers, and leaders. But such program management topics are the subject for another book. Although operating an adventure program falls to managers rather than leaders, you may still wish to learn the responsibilities that lie beyond trip planning.

SUMMARY

Proper trip planning is vital for any adventure programming experience (Kanangieter, Sawyer, Gookin, & Johnson, 2004). When trip planning is routine, checklists can serve as an invaluable tool. A trip checklist covers the trip rationale, activities, locations, routing and scheduling, participants, groups, staffing, equipment, food and water, accommodation, transportation, communication, budgeting, and safety and risk management. Triple-check every aspect of preparation before the trip. But don't stop there! You have further responsibilities during the trip to risk management, nature, learning, enjoyment, and completion (in that order); while traveling on the route to pace, control, rest stops, and leader position; at the camp to site selection and organization; in difficult conditions; and after the trip to evaluation and cleanup.

QUESTIONS TO THINK ABOUT

1. What are the guiding principles of trip planning?
2. What are the key contents of a safety and risk-management plan?
3. Under what circumstances would you reprioritize the leader's responsibility for risk management, nature, learning, enjoyment, and trip completion?
4. What is the best line position for you to take in a traveling group and why?
5. How will you plan trips differently after having studied this chapter?
6. Plan a trip from start to finish. Present your trip to the class and then have them critique it, stressing the positive aspects and the areas you may want to improve.

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