

# Seattle Naturalists – Leading a Trip

## Recommended Leader Checklists

Use these as an option to avoid forgetting anything important!

### **Week Before the Trip:**

- Check for up to date waivers and emergency contact info for all participants on the roster (“export selected members” into a .csv file that can be loaded into excel).
- Check DOT website for road closures/delays
- Call Forest Service for updates on road access, trail conditions, blowdowns, stream crossings, anticipated campsites, insects, water availability, etc.
- Check weather forecast (Tip: if it’s on the WTA website, you can find a link to the National Weather Service Forecast below the location map).
- Notify participants of any significant changes in the trip or gear/skills requirements. Send this “Hello Hiker” email at least a day before the trip closes.

### **Day before the Trip:**

- Print out multiple copies of driving directions to trailhead, to give to drivers
- Print out trip roster with participant contact info, emergency contacts (via “Print All” button, landscape format), phone numbers for ranger stations, any lodgings, boats or shuttles, perhaps where appropriate BLM or similar offices
- Check and print out weather forecast

### **At the Initial Meeting Place:**

- Arrive early
- Bring trip roster, contact info, directions to trailhead, weather reports
- Introduce yourself as leader, check off names of hikers on roster.
- Make sure everyone has a ride; note who is in what car
- Give driving directions to drivers, exchange cell phone numbers among drivers (in case someone doesn’t show up at trailhead, or to coordinate pit stops along the way)
- Review and check for required gear (better to find out something is missing here than at the trailhead).

### **At the Trailhead:**

- Introduce yourselves. A good “icebreaker” question is useful, not just names
- Ask for a volunteer with first-aid training/experience to be your first-aid leader. Review their role, give them a chance to say a word or two.
  - Ask participants to inform first-aid leader of relevant medical conditions in private.

- Ask participants to share with the group if they have any life-threatening conditions that may arise – location of critical meds.
  - Find out where each person is carrying their first-aid kit.
- Review the map and plan for the day. Remind everyone of approximate distance and elevation gain to expect at various points. Communicate explicit expectations about:
  - How you intend to manage the pace –“staying together” rules
  - Party separation procedure
  - Safety first! Will turn around if unsafe
- Final check of critical gear, water supply.
- Encourage communication of concerns.
- Designate front guard, sweep. (good to have first aid skills at both ends)
- Remind drivers to post passes, hide valuables.

### **On the Trail:**

- Stop in 5-15 minutes for a clothing & pack adjustment, then periodically thereafter based on how your slower participants are doing.
  - At rest stops allow slower hikers to actually get a rest
- Manage your group’s pace for safety and morale (See options below). At the very least, gather people at junctions, water crossings or every 15-30 mins between.
- Regularly reinforce ‘staying found’ with the map.
- Reinforce “buddy system” for party separations – should be an absolute requirement.
- Encourage regular hydration and snacking
- Encourage proactive communication about safety and comfort needs. If hot spots on the feet, stop before you have a blister! If hurting or injured, stop and ask for help! If pace is too fast, slow down and speak up! If uncomfortable with a snow, rock or water crossing, ask for help! Stop to remove a layer or slow down before you are sweat-soaked. Add warm clothing if you are cold.
- Leader in the back vs. leader at the front
  - Regardless, keep a close eye on how each person is doing. May require moving back and forth in the group through the day.
    - Get a volunteer to ‘sweep’ and ‘front lead’ when you are at the other end, and ensure they understand your expectations.
    - Sweep should always stay at the end of the group and watch out for the morale, safety and proper route selection of the slower contingent. Rotate this role through the trip so that it doesn’t become a downer for them to always be at the end, get the last pick of tent spots, etc.

### **Vigilance and Decision Making:**

- Stay vigilant for participation, weather, route issues through the day especially toward the end. Stop and help struggling participants in discrete, considerate way.

- Don't take your group beyond the capabilities of the weakest members.
- If conditions become threatening and/or route is more difficult than expected, make a decision with focus on safety of the entire group.
  - Involve the group in decisions if situation allows. Draw out quiet people.
  - Don't be afraid to make an unpopular call if YOU believe it's important for safety of the group!

### **Some Leader Options to Manage Pace for Safety**

- On certain routes (unclear trails, hazardous conditions), you may require that the group stays close together.
- Always tell someone if you're leaving the trail for a party separation, and ask them to wait until you catch up again.
- If you get far enough ahead that you can't see the others, stop and wait until the rest of the group is in sight. Consider adjusting your pace a bit (vs. 'sprint and wait').
- Stop and wait for the leader at all junctions and significant stream crossings or any point of ~danger or confusion (use very clear language here!)
- Remind everyone to look out for each other. Could suggest a buddy system – participants self-select buddies. Instruct everyone to let someone know when they need a party separation or photo stop; that other person should move on a polite distance and wait for the person to return.
- Check that permits are properly displayed, that vehicles are locked and everyone has their keys (good to have an extra set somewhere and tell others where they are).
- Consider appointing a sweep aka rear guard, preferably with first aid skills.

### **After the Trip:**

- Ensure everybody has returned to trailhead and has a ride back to their vehicle.
- Make sure all cars start before you leave the parking area.
- Update your roster credits and file an online Trip Report within 1 week.
  - This will come up on your Activity History the day after your trip ends. (see below)
  - First update your roster which credits your participants with completion (and helps us track who has done what). If appropriate, enter confidential participant notes by clicking 'edit or cancel' next to a participant's name, and scrolling down to 'Confidential Participant Notes'. These notes will be shared with the sponsoring committee for followup. Note if someone shows leader potential!
  - Then go back to the main page and find the route-place, scroll down and choose Trip Report. Enter your trip report including detailed information on trail conditions, route-finding challenges, etc.