



**OUTDOOR COUNCIL OF CANADA**  
**CONSEIL CANADIEN DE PLEIN AIR**  
*Partners In Leadership / Partenaires En Leadership*

# Field Leader (Hiking)

## Student Manual

Second Edition



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## Contents

Introduction	
About this Course .....	1
Chapter 1	
Scope of Practice .....	5
Chapter 2	
Leader's Motivations.....	8
Chapter 3	
Event Planning (The Vision) .....	11
Chapter 4	
The Hiking Terrain Matrix .....	17
Chapter 5	
Event Planning (Hazards and Defences) .....	21
Chapter 6	
Unexpected Situations.....	32
Chapter 7	
Event Planning (Building Teams).....	36
Chapter 8	
Environmental Responsibility.....	41
Chapter 9	
Last Minute Checks .....	45
Chapter 10	
Group Management.....	47
Chapter 11	
Situational Awareness .....	52
Chapter 12	
Reflection .....	55
Appendix A	
Additional Guidelines for the Scope of Practice .....	59
Appendix B	
Participant - Equipment List.....	63
Appendix C	
Leaders - Equipment List.....	66
Appendix D	
Event Plan Template .....	68

## Introduction

Welcome to the Outdoor Council of Canada's Field Leader (Hiking) course. Perhaps this is the first course you have ever taken on the road to becoming an outdoor leader, or maybe you already have substantial leadership experience. Either way, we hope that you find this course to be an exciting and rewarding experience. Within this course, you will find some of the most current ideas on providing quality outdoor leadership experiences.

Outdoor environments offer a multitude of leadership possibilities through a broad range of activities (e.g. neighborhood walk, biology class in an urban park, breathtaking adventures in the remote wilderness, etc.). The more ambitious your plans, the more there is to learn. This course offers a solid foundation for any outdoor leader.

## About this Course

The Field Leader course will provide you with a practical guide for organizing a one-day event in natural environments during three seasons. This course is as much about designing and leading an event that provides a high-quality experience for your participants as it is about promoting safety. In fact, quality and safety go hand in hand. The processes needed to promote quality are the same as the ones which increase safety.

Throughout this course, you will learn foundational concepts for providing participant-centered leadership (leading that is centered around the needs of the participant). In doing so, you will design and implement quality experiences that your participants will find valuable.

This course has two components, the leadership part, and the activity part. The leadership skills taught in this course are those needed to successfully plan and lead a group in any sort of activity, indoors or outdoors. Since leadership is attached to an activity, this version of the course has been matched with activities that take place in a hiking environment.

## Prerequisites

### Age

You must be 16 years of age or older to take this course. Adults who successfully complete the course are designated as having a "Field Leader (Hiking)" certification. Minors are designated

as having an “Apprentice Field Leader (Hiking)” certification. The word Apprentice is automatically dropped on the day the graduate reaches the age of majority.

## **Skills**

In this course, we will not be directly teaching hiking and navigation skills. However, we expect that you will be able to hike up to five km while carrying an eight-kilogram pack over the period of a few hours. That said, we recognize that some people cannot meet this expectation for justifiable reasons. In such case, a special exemption is possible. The Outdoor Council of Canada would need to be contacted prior to the course to confirm such agreement.

## **Course Requirements and Examination**

Our goal is for you to pass this course. However, leadership is a big responsibility. We can assure you that the more effort you put into this course the more you will receive from it.

## **Pre-course Reading**

You will need to read this manual in advance and answer the quiz questions you find here. These quizzes are for your learning and reference as well as being a great preparation for the written test you are required to take at the end of the course. During the course, your instructor will answer any questions you might have about the quizzes, material or the test.

## **Course Participation**

In order to cover a great deal of material in a short time this course includes presentations, many discussions and a few experiential learning exercises. Your participation will be essential to deepen your understanding of the concepts presented in this course.

## **Field Session**

This course includes a session outside. This time outside will be essential to solidify the concepts discussed in class and make them more concrete.

## **Assessment**

Your knowledge will be assessed at the end of this course. The assessment will be discussed by your instructor.

## **Pass/Fail**

The knowledge evaluation is usually the only requirement to pass the course. However, you should be aware that in exceptional circumstances a person can fail based on their behavior during the course. In such instances, an instructor can fail a person on subjective grounds if they believe that the student:

- a) Failed to demonstrate sufficient respect for the materials and/or learning processes required for the course.
- b) Failed to demonstrate sufficient respect for their fellow students or instructors.
- c) Demonstrated obvious psychological distress that leads the instructor to believe that the person is struggling with psychological self-care.
- d) Failed to demonstrate during the field session that they had the physical skills required to care for themselves and their participants in Class 1 Hiking Terrain.

Conditions for the use of subjective criteria for failure:

- a) Subjective failure will only be used under exceptional circumstances.
- b) Where an instructor sees evidence during a course that leads them to suspect that they may need to exercise their subjective judgment prerogative, and there is still time for the student to reform their behavior, the instructor must initiate a discussion with the student telling him or her of their concerns and provide specific instructions as to the change they wish to see.
- c) A subjective failure can be appealed to the Outdoor Council Certification Committee whose ruling shall be final.

## Terminology and Definitions

This course covers essential outdoor leadership concepts. These concepts are applicable in a diversity of contexts and some key words were chosen to represent this.

- **Field Leader:** Any person taking a leadership role for others while being outdoors. This can be a paid or a voluntary position with strangers, friends or people under their care.
- **Outdoors:** Any place outside that requires some thought and management to ensure people remain comfortable and engaged in the activity. Outdoor environments can be fairly close to accessible services or in remote natural spaces. Typically, situations such as team sports outside are not included in this definition.
- **Three Seasons:** The words 'Three Seasons' describe environmental conditions that do not require additional winter training. To evaluate the conditions, refer to the factors described below. The presence of two or more of these factors will qualify your event as a winter event, setting it beyond the scope of this course. In some cases, only one factor may be sufficient to create conditions that are challenging enough to qualify your event as winter.
  - ❖ The average temperature during your event is forecasted or recorded as 5°C or lower.
  - ❖ Most of the ground is covered in snow.
  - ❖ Snow is forecasted or is falling during your event.
  - ❖ Long periods of moderate to heavy rain are forecasted or experienced during your event and the temperatures are 10°C or lower.
  - ❖ Strong winds are forecasted or felt for a sustained portion of your event.
  - ❖ Your event takes place between October 1st and April 1st.
- **Participant:** The people who will go outdoors with you and for whom you will be responsible. Participants can include clients, students, friends, club members, children, etc.
- **Event:** Events include all the outdoor activities for your participants from the moment they join you until the moment they leave you. Events can include many different types of activities (e.g. hiking, games, nature appreciation, lesson, group discussion, etc.).
- **Event cycle:** The sum of all the actions and considerations necessary to create a quality event and improve future ones.

## Chapter 1

### Scope of Practice

The Field Leader (Hiking) Scope of Practice is as follows:

*This course will certify you as a Field Leader for one-day events held in 3 seasons and in Class 1 terrain only.*

#### **Field Leader Requirements**

Field Leaders must:

- *Implement the event cycle as described in this course. If a Field Leader is unable to implement a specific element of the event cycle due to particular circumstances, they must act in ways that respect the intent of the event cycle.*
- *Have inspected the event venue at least once in the past 12 months.*
- *Operate under the procedures and guidelines of a risk management plan<sup>1</sup>. This risk management plan must have been created by a competent individual.*
- *Supervision<sup>2</sup>:*
  - *Be supervised by another, more experienced, outdoor leader.*
  - or*
  - *Work within a learning community whose members are all typically OCC certified Field Leaders.*

#### **Apprentice Field Leaders and Experienced Field Leaders**

*An Apprentice Field Leader must work under the direct supervision of a more experienced outdoor leader.*

*To lead others in higher class terrain, a Field Leader must possess additional training and experience that has been validated as sufficient by other respected outdoor leaders.<sup>3</sup>*

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<sup>1</sup> See Appendix A for a description of minimum requirements for a risk management plan.

<sup>2</sup> See Appendix A for more information on what qualifies as supervision.

<sup>3</sup> See Appendix A for more information on respected outdoor leader and validation processes.

## Scope of Practice Explained

For novice Field Leaders, clear guidelines that are easy to follow increase the likelihood of creating quality experiences. As such:

*This course certifies a person to act as a Field Leader during day-long events in three season environmental conditions and in Class 1 terrain only.*

And, a Field Leader must:

*Implement the event cycle as described in this course.*

And must:

*Have inspected the event venue at least once in the past 12 months.*

However, even with clear guidelines, it is possible to make mistakes which reduce quality and increase risk. Consequently, a Field Leader must:

*Operate under the procedures and guidelines of a risk management plan.*

And:

*Be supervised by another, more experienced, outdoor leader.*

In cases where the supervisor has less outdoor leadership experience than the Field Leader, or formal supervision is unavailable, supervision can be replaced by:

*Working within a learning community whose members are all typically OCC certified Field Leaders.*

For Apprentice Field Leaders, formal supervision is mandatory, they must:

*Work under the direct supervision of a more experienced outdoor leader.*

As a leader grows in experience and capacity, it is possible for them to face more complex situations while still ensuring the quality of the event. The leadership skills presented in this course are useful for novices and experts alike. As such, competent Field Leaders can go into higher class terrain if they follow the event cycle, visit the venue, respect supervision requirements and:

*Possess additional training and experience that has been validated as sufficient by other respected outdoor leaders.*

Additional information about risk management plans, effective supervision, and validation by other respected outdoor leaders can be found in Appendix A.

Field Leaders must be aware that **the OCC will be unable to endorse any individual failing to comply with the Scope of Practice** described above and in the relevant appendices.

### Quiz 1

- a) A person may be qualified to lead an activity even though they are not certified to do so. You will know that you are qualified to lead an event into terrain you are not certified for when:
- 1) You have led outdoor events for more than 10 years and feel you have the necessary experience.
  - 2) You have 3 years experience and over 100 days in the field and you have not had an accident.
  - 3) Other respected outdoor leaders with relevant qualifications agree that you have the required skills, experience and judgment.
  - 4) Any of the above.
- b) Once completed, this course will prepare you to lead and oversee all aspects of an event on your own. True  False
- c) Check each element of the Scope of Practice for this course.
- 1)  Implementing industry standard hiking techniques.
  - 2)  Deliver day-long events in winter.
  - 3)  Be supervised by another, more experienced, outdoor leader.
  - 4)  Validate your experience with other competent leaders before going into more challenging terrain.
  - 5)  Document in triplicate, how each aspect of your event respects the scope of practice.

## Chapter 2

### Leader's Motivations

#### Outdoor Leadership – What's in it for me?

There are many reasons why a person might want to become an outdoor leader. Each individual will have different reasons (motivations) for why they like to spend time outside. These motivations will influence their choices and can have a positive or a negative impact on the event.

For these reasons, it is important for us to reflect on why we might want to be an outdoor leader. To help you do this, please fill in the exercise at the end of this chapter.

#### Good Leaders Enjoy Their Role

Outdoor leadership should be an enjoyable experience. To do this, personal motivations must be taken into consideration. This is important for two reasons:

- 1) Leaders who enjoy leading will share their enthusiasm with their group.
- 2) Good leadership requires hard work, and it isn't possible to pour your heart into a job you don't like. Being a good leader is easier if you are getting something valuable in return.

This does not mean doing the tasks you like and avoiding the ones that you don't. Leadership requires the completion of many tasks, and you must do all to the best of your ability. If you skip some tasks, the quality and the safety of your event will be compromised, which will reduce your satisfaction.

#### Not all Motivations are Suitable for an Event

Some motivations might be important to you, but are not suitable for your group or event. If personal motivations are prioritized over the group's, there is a chance that you will create an unpleasant, or even risky experience for your group. Here are some common examples:

Getting the right level of challenge is important for everyone, whether it be a physical or mental challenge. Set the challenge too low, people may be bored. Set it too high and participants disengage, and the risk goes up. A common leadership mistake is to set the

challenge too high because the leader enjoys a very high level of challenge and assumes the participants will too.

Running similar events in a familiar place can help improve quality. However, running the same event over and over again can become boring. This can result in leaders overlooking hazards.

There are two strategies that can be used to minimize the negative impact of these. The most important is being participant centered. Each group is unique and reacts differently. By engaging fully with your group, you will find both challenge and novelty. The second strategy is to apply only a few changes at a time to your events. This incremental approach will make it easier to address unexpected issues.

### **Satisfying Motivations and Leadership Requirements**

Becoming an effective outdoor leader requires self-awareness. Good leaders know their motivations and how they can be satisfied during an event. In addition, good leaders know how to shift their expectations to make sure that their motivations do not have a negative impact on their event. To help you do this, you can follow this process:

Step 1): Identify what motivates you to be an outdoor leader.

Step 2): Divide these motivations into three types:

- A. Motivations that have no place on our events (e.g. personal thrill-seeking while leading). These should be satisfied in our own time.
- B. Motivations that are satisfied by the event (e.g. the joy of working outside). These we should treasure.
- C. Motivations that are in conflict, but must be met anyway (e.g. need for some personal time). These we must balance.

Step 3): Plan and execute your event so that only type B and C motivations are satisfied. Design your event to satisfy as many of those motivations as possible. The event design should also include ways to reduce the negative impact of type C motivations on the group. For example, the leadership team can share the workload and enable leaders to get some personal time.

### Personal Motivations (quiz 2)

(Try to be as honest as you can. There is no right or wrong response)

Circle how much the following items motivate you to be an outdoor leader.

	Don't like			Love it	
	1	2	3	4	5
Being outdoors	1	2	3	4	5
Learning from others	1	2	3	4	5
Physical activity	1	2	3	4	5
Working with adults	1	2	3	4	5
Working with children	1	2	3	4	5
Sharing my knowledge	1	2	3	4	5
Being the center of attention	1	2	3	4	5
Role modeling	1	2	3	4	5
Facilitating group dynamics	1	2	3	4	5
Working within the policies of my organization	1	2	3	4	5
Playing a supporting role in a group	1	2	3	4	5
Making a difference in the lives of others	1	2	3	4	5
The freedom unplanned situations offer	1	2	3	4	5
New experiences	1	2	3	4	5
Being in familiar places	1	2	3	4	5
Risk taking	1	2	3	4	5
Quietly enjoying nature	1	2	3	4	5
Being alone, or with a few close friends	1	2	3	4	5
The respect of others	1	2	3	4	5
Being in charge	1	2	3	4	5
Leading friends and/or family	1	2	3	4	5

## Chapter 3

# Event Planning (The Vision)

### The Vision

Quality events are planned with purpose. This requires finding a balance between event objectives, participant needs, the nature of the venue, and the activity. This creates the foundation for high-quality participant-centered events.

### Objective(s)

It is important to have a clear idea of what participants will get out of your event. Examples might include fun, education, increased social skills, personal wellbeing, physical exercise, etc. These objectives will influence how you design your event and should be centered on your participants as opposed to your personal motivations. Once outdoors, the objectives will help you adjust your event and make decisions. After the event, a reflection process will help you check if your objectives were met.

It might be tempting to include as many objectives as possible into an event. However, too many unclear objectives can dilute the impact of an experience and make it very difficult to realize any of them. A new event should be designed with only a few but significant, tangible, and realistic objectives. Additional ones can be added when the event is repeated.

### Your Participants

To meet the needs of your participants, you will have to learn about them and anticipate how they will respond to the event. These are some of the things you should consider:

- *How new will this experience be for them?* To you, a day hike may feel familiar. However, if your participants have little experience, they may be unprepared. If this is the first event you have had with this group, make sure you find out what experiences they have.

Inexperienced participants tend to:

- 1) Overestimate their experience or ability.
- 2) Become exhausted earlier than you expected.
- 3) Lack basic self-care skills such as pacing themselves, or preventing a blister.

- *What is the right level of physical challenge for them?* Walking outdoors might be surprisingly tiring for inexperienced participants. This can be true even on a relatively flat trail as hiking outdoors requires muscles that are rarely used while walking inside or on pavement. In addition, many participants do not know how to manage tiredness while hiking. The right level of difficulty is the one that leaves them feeling that they have met a challenge, but not to the extent that they never want to hike again.
- *How do these participants work together as a group?* Every group has its own dynamic. A group of non-competitive close friends may be easier to lead while a group in which the participants do not know each other could be more challenging. The most difficult group to lead is one where there is competition or dislike between the members of the group.
- *How well do you know the group (and vice versa)?* When you do not know the group well, you will need to make more conservative choices. In these situations, it is a good idea to plan a less complex event. If the group does turn out to be stronger than expected, you can move to a more ambitious Plan B.
- *How well do you know the group in hiking terrain?* Even if you know the group well in one environment (e.g. in the city), you may be surprised by how differently they perform outdoors. Again, start with a conservative plan A, and move to plan B if they perform well.
- If possible, include a training day. This will give you an idea of their potential.

## The Activity

There are many lasting educational and health benefits to outdoor activity. However, a poorly planned event can have the opposite effect. If this impact is negative, it can hurt a person's self-esteem and convince them that being outdoors is awful or dangerous.

When planning for an event, it is important to ensure that activities:

- 1) **Support Your Objectives.** The realization of your objectives will depend on what you do during your event. For example, visiting a local meadow likely supports the objectives of an ecology program. However, not all activities will help you meet your objectives. An example of this would be including a difficult hike in the event you designed for your ecology program. Although hiking has physical benefits, participants may get tired and not retain the information associated with ecology.

- 2) **Fit With Your Participants.** Your participants' interests, physical capacity and need for direction will influence your activity choices. Continuing the ecology program example from above, some groups may enjoy an activity that requires detailed identification of different trees. For other groups, it may be much more appropriate to walk through a diversity of ecosystems, sit at a lookout, and enjoy the incredible beauty of nature.
- 3) **Transition Easily.** Depending on your event, you may decide to include more than one activity. An event with many activities will be harder to execute yet some activities can easily transition from one to the other. For example, a relaxation activity at a lookout located on the trail is easy to transition to. Conversely, a group game following an activity where participants were exploring the area in small groups will require more effort. This transition is more complex since it will take longer to get participants together and give instructions. Keep in mind that going to the bathroom, eating a meal and having a break can all be considered activities.

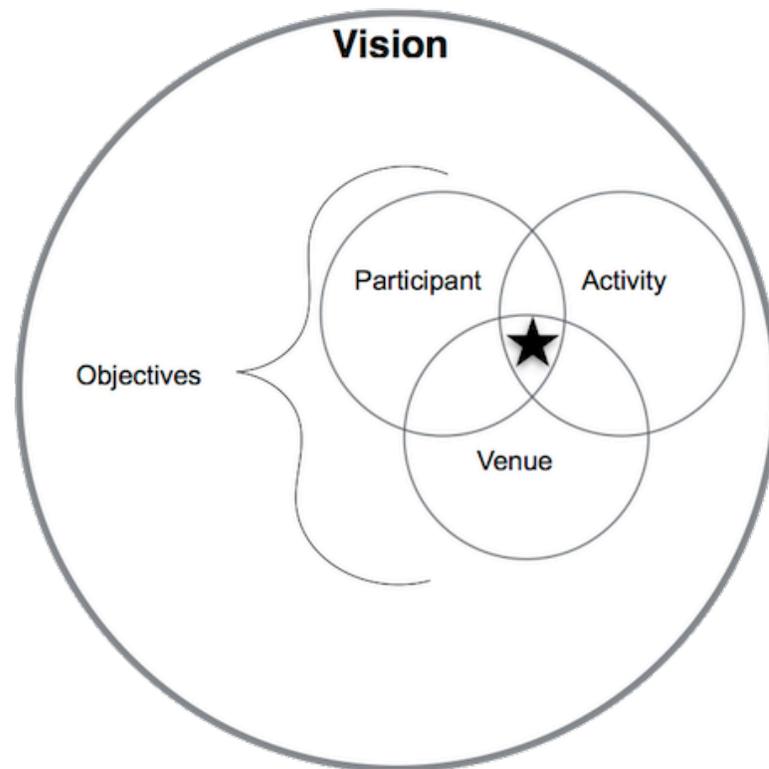
## **The Venue**

The location for an event can be a site that inspired the leader in the past. Choosing a special place to share with participants is great, but it can create issues. This personal connection could skew the leader's assessment of the situation and increase the chances of creating an unrealistic plan. This approach has contributed to negative experiences for many leaders and their groups.

The appropriate approach is to have clear objectives with enough knowledge of your participants so you can then choose the right venue. There might be times where the venue has been chosen for you. Even in such instances, this approach will allow you to modify the way you use the venue to fit with your group. A well-chosen venue will engage the attention and enthusiasm of the group while minimizing the chances of having a negative experience.

## **Bringing it all Together**

All components of the vision will impact each other and influence your event. Participant-centered programming is created by finding the right balance to promote quality.



### The Event Plan (part one)

As you plan your event, it will be important to write down some key information. This document, called an event plan, will help you identify potential issues, improve your event review and provide essential information if an accident happens. The event plan should be brought to the venue and used as a reference. An event plan template can be found in appendix D.

At this point in the planning process, you should have enough information to write down the schedule section of the event plan. This section uses the information you have gathered about your objectives, participants, activity and venue to create a more detailed description of the event. The schedule should include what you are going to do and when you are going to do it. This will help you identify any aspect of your vision that is unrealistic.

Typical elements of a schedule might be:

- a) **Start & Finish Times:** These are the times that will bracket your event. Everything you have planned for the day must fit between these times.

- b) **Driving Travel Time:** If you have to drive, this time needs to be deducted from the total time.
- c) **Hiking Travel Time:** You will need to calculate how long it will take to complete the route. The estimated speed of the slowest member of the group should be used to calculate this time.

A standard calculation for hiking time on a good trail for adults is 15 minutes per km of horizontal distance plus 20 minutes per 100m of elevation gain. However, this will depend on both the age and physical condition of the group.

Keep in mind the time at which the sun sets. It is recommended to plan a return to the trailhead about one hour before sunset. Otherwise, you will need more equipment to travel and remain warm. Furthermore, group management will require more effort.

- d) **Trailhead Organization Time:** You will need to allow time to get going at the beginning of the day. This time is needed by participants to get ready and for you to check that everything is organized.
- e) **Contingency Time:** You need to set aside time at the end of the day, particularly if it is very important that you finish on schedule. This will ensure that small disruptions do not create a time pressure.
- f) **Specific Activities:** If you are incorporating specific activities other than hiking into your day, you will need to schedule time for these.
- g) **The Route:** Without being clear on the details of the route, it will be impossible to match the venue to the participants and the activities. Knowing your route allows you to calculate travel time, including breaks and other activities.
- h) **Lunch Spots:** Knowing where you will eat will simplify planning and help your participants manage their own comfort. However, be ready to adjust your lunch plans depending on conditions.
- i) **Decision Points:** Few events go exactly as planned, and it is wise to consider in advance certain factors or conditions that might require a major change to the event plan. For many hikes, this will include a decision point. For example, this could be a

specific turnaround time, or a point that you must have reached by a certain time if you are going to be able to complete your event.

- j) **Reflection Time:** Including reflection time can enhance the benefits of an event (refer to the reflection chapter for more information).
- k) **Plan B:** You should consider in advance factors (e.g. adverse weather) that may cause you to change your event entirely. A Plan B will make it easier to maintain event quality if these factors occur during your event.

### Quiz 3

a) What are the four elements that need to be integrated during the vision stage of event planning?

- |          |          |
|----------|----------|
| 1) _____ | 3) _____ |
| 2) _____ | 4) _____ |

b) A poorly-planned event can erase the potential educational and health benefits of outdoor activity. True  False

c) The better you know your participants, the more you will be able to plan an event that meets their needs. True  False

d) A well-planned event does not need a back-up plan (Plan B). True  False

e) Since outdoor events can have a strong physical and emotional impact on participants, it is important that they be positive experiences. True  False

f) A group that performs well in a classroom setting can be expected to perform well in an outdoor setting. True  False

g) Having a clear objective for your event will assist you in choosing an appropriate activity and venue. True  False

## Chapter 4

# The Hiking Terrain Matrix

### Complexity

Complex challenges can be fun and exciting, but they also increase the probability of unexpected situations. Unexpected situations can disrupt programs and increase risk.

Leadership itself is complex and challenging. Although this course will help you prepare for such roles, experience will be the key ingredient that enables you to turn the concepts presented in this manual into a seamless performance. The best approach for beginners is to develop their leadership skills in simpler terrain before going into more challenging terrain. As your skill and experience increase, you will find that your ability to understand complex natural environments improves.

Hazards found in complex terrain are not always obvious. Thus, the inexperienced leader may not see the hazards they encounter. Several accidents have happened to leaders who did not see the danger until it was too late. For this reason, leaders need to have very specific guidance as to what terrain offers acceptable risk margins for their skill level. To assist with this the OCC has developed the Hiking Terrain Matrix.

### About the Matrix

The general term *hiking terrain* describes an enormous variety of natural environments. Some of these environments offer very little in terms of risk exposure while others are very complex and hazardous. The classes in the Hiking Terrain Matrix describe land based environments that are not dominated by buildings. This could include a large public garden or a small urban park. This course certifies you to lead others in Class 1 terrain only. Additional qualifications that have been validated as sufficient by other respected outdoor leaders are required to lead in Class 2 and Class 3. Refer to Chapter 1 for more information on the Scope of Practice.

## The Hiking Terrain Matrix

Risk Factor	Class 1	Class 2	Class 3
Time to additional resources at road or lodge	No more than 3 hrs.	Multiple days, but no more than 8 hrs.	No Limit.
Fall Exposure	Easily managed or avoidable.	Fall hazard exists but manageable with moderate consequence.	Short sections with unavoidable & serious consequence, but can be managed without a rope.
Technical Difficulty	Smooth & Easy. Sections of unstable footing are short & isolated.	Talus and loose footing, some rough sections, trails may be poorly maintained.	Use of hands may be required. May be sustained sections of unstable footing.
Fresh Water	Mid-calf deep for slow moving and ankle deep for fast moving with no downstream hazards.	Hip deep for slow moving and knee for fast moving with no downstream hazards.	Waist deep for slow moving and crotch deep for fast moving.
Tidal Water	Gently sloping and non-slippery intertidal zone. No rogue waves.	Surge channels and tidal entrapment easily avoided. Moderate wave hazard may exist. Moderately sloping. Some slipping hazard.	Surge channels, tidal entrapment and wave hazards may be present. Steeply sloping, rocky, and slippery intertidal zone.
Weather Exposure	Generally sheltered, or easy retreat to sheltered area.	May be exposed but can retreat to sheltered area within 45 minutes.	Exposed areas with difficult or no retreat.
Navigation	On trails, or untracked with natural boundaries and/or handrails, may require simple map.	Simple route choices. May require a map, compass and/or GPS.	Complicated navigation, difficult route finding with minimal landmarks, requires map and compass and/or GPS.

To effectively use the Matrix, it is important to understand factors that increase complexity and hazard exposure for groups. For this course, we will restrict our comments to Class 1 Hiking Terrain. The risk factors are:

- a) **Time to Additional Resources.** On a hike, you have a limited amount of resources such as food, clothing, shelter, and transportation. If something goes wrong, the time that it takes to access additional resources can complicate matters. For example, getting wet in a storm is not usually serious unless it persists long enough to put the participant at risk of hypothermia. To calculate time to additional resources, use the pace of the slowest members of the group during a consistent walk.
- b) **Fall Exposure.** Fall exposure refers to any drop that is high enough to require a participant to use their hands to step down. Easily managed or avoided means that you can either walk around the drop or it is guarded by a sturdy rail or fence. A drop requiring a single step and which can be easily managed with a helping hand is acceptable.
- c) **Technical Difficulty.** Technical difficulty refers to how hard it is to walk confidently in a coordinated and controlled way. Unstable footing can come from small rocks that roll under your feet, larger slippery rocks, steep slopes, or other features. Unstable footing is tiring to walk on and easy to fall on. Most groups can manage a short section of unstable footing with additional effort and extra concentration. When these sections become longer, energy gets used up, concentration wanes, and the likelihood of an accident increases.
- d) **Fresh Water.** Sometimes, hiking terrain involves crossing water. By ensuring that the route excludes deep water and currents, you minimize the possibility of drowning. Slow moving water is defined as current that creates no noticeable pressure on the body. Fast moving is anything else. Downstream hazards refer to river features that can drown people. It is recommended to treat any rapid, or fallen objects in the river as downstream hazards. These criteria also apply if participants go into a lake or other body of water (e.g. study of frogs in a pond).
- e) **Tidal Water.** The zone between high and low tides (intertidal zone) and nearby areas can be hazardous. Areas where rising tides cannot cut you off, there is no possibility of a slip into the ocean, and where there are no rogue waves constitute Class 1 terrain. Rogue

waves are unusually large waves hitting the shore and capable of pulling a person into the water. The presence of rogue waves is usually known by local land managers or outfitters.

- f) **Weather Exposure.** Even with the right clothing, prolonged exposure to the elements can have a significant impact on your group. We can reduce negative impacts of exposure by having easy access to sheltered areas, areas where the group will be protected from strong winds, rains, or sun and reduce the likelihood of being hit by lightning. A sheltered area does not need to be a building. Many natural environments offer adequate shelter (e.g. a forested area, the lee side of a hill, etc.).
- g) **Navigation.** Getting lost has many potentially serious consequences such as the possibility of walking into more complex terrain. Class 1 terrain includes manmade trails and some open terrain. A trail map should be sufficient to find your way. Open terrain must include obvious natural boundaries or handrails. A handrail is a feature easy to recognize and use to orient oneself (e.g. keeping a river to the left in one direction and to the right on the other). A meadow, summit, lookout, play area, can all be acceptable examples of open terrain.

Experienced hikers will notice a similarity between the hiking matrix and the Yosemite Decimal System (YDS). The Hiking Terrain Matrix tends to align with the YDS and offers more criteria and information for Field Leaders to assess terrain. In addition, only YDS class 1,2,3 can be classified as hiking terrain. YDS Class 4 terrain is considered technical mountain travel and YDS class 5 is technical climbing. Class 4 and 5 terrain require additional technical training and are not covered by the OCC Scope of Practice.

#### Quiz 4

- a) You must be on a trail to be in class 1 terrain. True  False
- b) Water depth for class 1 terrain is \_\_\_\_\_ for slow moving and \_\_\_\_\_ for fast moving.
- c) Water depth is based on the \_\_\_\_\_ (choose: shortest, average, tallest) height found within the group.
- d) A sheltered area can only be a building. True  False
- e) With appropriate validation from respected outdoor leaders, you could lead events in class 4 terrain and still be covered by the Scope of Practice. True  False
- f) With appropriate validation from respected outdoor leaders, you could lead events in class 2 terrain and still be covered by the Scope of Practice. True  False

## Chapter 5

### Event Planning (Hazards and Defences)

Hiking in Class 1 terrain is a low risk activity. However, as leaders, it is our responsibility to recognize that there are still some risks and to manage them appropriately. This chapter will talk about some of the principles and techniques used in this process.

Quality events don't just happen. Careful planning is required to produce a high quality, low-risk event. Accidents are not random events but the outcome of a series of decisions. This series of decisions is what we call the accident chain. Luckily there are ways to break the accident chain before it leads to a problem. By planning your event in a systematic way, you significantly reduce the chances of accidents happening.

#### Hazard, Defences

A **hazard** is anything that might result in negative consequence for a group. Rain is a common hazard. The consequences of being caught in a rainstorm can be many. They range from the very minor, such as getting damp (common) to life-threatening hypothermia (rare).

Consequences can be both physical and emotional. Usually, people tend to associate injury with physical injury because it is easier to identify. However, poorly run events can have emotional consequences such as negative feelings about the outdoors, loss of self-esteem, loss of social status, etc.

A **defence** is anything that can either reduce the consequence when a hazard is encountered or reduce the probability of encountering a hazard. For example, good raingear is a defence that reduces the consequences of getting wet and avoiding trails with flash flood potential is a defence that eliminates this risk.

#### Vulnerability and Resilience

Our **vulnerability** is the degree to which we can be affected by a hazard. For instance, children will usually get cold quicker than adults if they get wet in a rainstorm, therefore making them more vulnerable in these situations.

Our **resilience** is our ability to respond to hazards in ways that reduce negative consequences. For example, a participant with raingear is more resilient to the effects of rain than one without.

Fostering emotional resilience will also reduce the likelihood of negative consequences. Participant-centered programming promotes emotional resilience and includes assessing resilience levels, monitoring of participants, and appropriate responses to emerging issues. Often, physical resilience will promote emotional resilience and vice-versa. Resilience is the opposite of vulnerability.

### **Good Planning Creates Resilience**

Appropriate planning to defend against common hazards increases our resilience to unexpected situations. Since accidents occur when the unexpected happens, a group that has a network of good defences will be more resilient. For example, carrying raingear increases resilience to rain, and increases our resilience to the consequences of other types of injury that might occur on a rainy day. Immobile participants waiting for first aid to be completed will remain warm and dry longer if they have the right clothing. A well planned, well equipped, and well led event creates a resilient group that has an excellent chance of experiencing a safe and enjoyable event even if the unexpected occurs.

### **Measuring Risk**

While in specific circumstances, an aspect of risk can provide positive outcomes, it can also create negative outcomes. In this section, we are primarily concerned with the management of negative risk.

Risk exists because we are not able to predict all possible outcomes from our decisions, and sometimes things may not work out as we hoped they would. Accidents can, and do happen to everyone. However, by making a good plan and remaining in Class 1 terrain, negative consequences are likely to be minimal.

It is useful to know that there is a standard way of measuring risk:

The size of a risk = probability (of hazard) x consequence (of hazard)

We can reduce size of risk by either reducing the probability (chances) of something going wrong, or by reducing the consequences if it does go wrong. Let's look at two common strategies outdoor leaders can use to reduce risk of both physical and emotional injury.

## **Reducing Risk by Reducing Complexity**

A very effective method to reduce risk is to reduce complexity. Complex situations (e.g. unknown participants, a new venue, or terrain with class 2 features, etc.) contain much more uncertainty for the leader. As leadership skills grow, leaders become more skilled at managing additional complexity. It is essential that a leader does not undertake an event that is too complex for their skill level.

This is why this course certifies for Class 1 terrain only. Class 1 terrain is defined so that:

- Natural hazards that require specialized training don't exist.
- A Field Leader should be able to successfully predict and/or manage any natural hazard that might be encountered.
- A Field Leader will typically have no difficulty in keeping consequences of unexpected situations small.

Class 1 terrain has a low level of risk. This is the right place for a novice leader to gain experience in managing other types of complexity (e.g. group dynamics).

Be aware that taking your group into Class 2 or 3 hiking terrain, without having experience that has been validated as sufficient by other respected outdoor leaders may expose your group to an unacceptable level of risk. In these cases, you will be operating beyond the scope of your certification.

## **Reducing Risk by Building Resiliency**

Another method to reduce risk is to build resiliency. To do so, you will need to familiarize yourself with potential hazards, and how to manage them should they be encountered. The following 4-step process can help you do this:

- 1) Identify the likely hazards.
- 2) Assess your vulnerability to those hazards.
- 3) Identify the appropriate defences to avoid or build resilience to those hazards.
- 4) Plan and prepare accordingly.

## An Important Note About the Nature of Risk

It is important to recognize that even with proper planning, there will always be some risk. Risk cannot be eliminated.

Good risk management includes matching defences to hazards. This means you should strive to find the balance between over-preparation or under-preparation. Both instances can reduce quality and increase risk. The risks associated with outdoor activity are oftentimes over-estimated. This perception can lead to an over-emphasis on defences.

Although identifying hazards and defences is part of your responsibility, it is important to do this within the context of the overall event cycle. Implementing each step of the event cycle will help you improve the quality of your event. These same steps will enable you to find the right match between defences and hazards, which will reduce the risks associated with your event.

### Quiz 5.1

- a) Good planning will eliminate risk. True  False
- b) You should try to match the size of your defence to the size of the risk. True  False
- c) Many types of hazards do not exist in Class 1 hiking terrain, so you do not need to include risk management in your event planning. True  False
- d) What two factors are considered when measuring the size of a risk?
1. \_\_\_\_\_
2. \_\_\_\_\_
- e) A leader's action and preparation does not influence group resilience. People are either resilient, or they are not. True  False
- f) Complex situations are more challenging because it is easier to miss a developing issue until it is too late. True  False
- g) It is difficult to ensure both safety and quality as they require two separate processes. True  False

## Potential Hazards

Hazards found in Class 1 terrain include environmental, wildlife, and people hazards. Different regions in Canada will offer different exposure to specific hazards (e.g. polar bears in the North, rapid weather changes in the mountains, fog on the coast, etc.) so it is a good idea to gather local knowledge about the area in which your event will take place. Reading guidebooks, or contacting outfitters, guiding companies, and local outdoor leaders is a good way to gather such information.

### Environmental Hazards

The most important environmental factor that you will need to manage will be weather. Major weather factors to consider are:

- a) **Rain:** Rain can result in participants getting wet and cold. When planning for rain, consider the following:
- Weather forecasts are not always accurate. For that reason, it is a good idea to bring equipment for rainier conditions than what is forecasted.
  - Consider canceling an event if the forecast indicates that there will be enough rain to result in participants getting seriously wet. The intensity of rainfall at which this decision is made should consider the vulnerability of the group.
  - The quality of raingear will influence the resilience of your group. Take this factor into account when planning your event. Quality raingear for everyone is important if rain is possible and your event takes you several hours from a warm and dry environment.
  - The insulating layers your participants are wearing will influence their resilience. With enough rain, they will eventually get wet. If participants are wearing cotton, they will get colder faster than if wearing fleece, wool or other synthetic fabrics.
  - If your event takes place close to a warm, dry shelter, then raingear may not be essential, but that will mean that your activities may have to be cut short if it rains.
  - Further from a dry shelter, you should consider bringing a light weight shelter (also known as tarps) and learning the required skills to erect it quickly.

- b) **Cold:** Weather can be cold, even in three-season environmental conditions. Rain or wind can make this worse. Everyone in your group needs to have sufficient clothing to remain warm.

For cold and cool weather, you need to make sure that everyone brings extra clothing such as tuque, gloves, and insulating layers. Usually, participants bring enough clothes to keep warm while moving. However, if you have to stop moving for more than a few minutes (e.g. for a break or medical emergency), participants may become cold.

- c) **Wind:** Wind can take away heat and/or be tiring for participants, especially if it is also cold or raining. Good defences include raingear, or retreating to a less windy area. Consider canceling your event if wind warnings are in effect. When winds are that strong, the likelihood of trees or branches falling increases.

- d) **Thunderstorms:** Thunderstorms are hard to predict. Good defences will include equipment for rain and wind. We must also take into consideration the risks posed by lightning strikes and do our best to defend ourselves against such risks. The best defence against lightning is to go inside a building or vehicle. If this is impossible, the next best approach is to avoid high-risk areas. Defences may include:

- Finding a wooded area at a lower elevation with trees that are relatively the same height.
- Making yourself as small and as low to the ground as possible, but do not lay flat on the ground.
- Avoiding ridge crests, summits and any high points in the immediate area. If taken by surprise on an open high point, go down as fast as you can.
- Avoiding flat and open areas, since you may be the highest object in the area.
- Do not tuck yourself up against cliffs or isolated trees. In particular, do not shelter in caves.

Both the lightning bolt and the ensuing ground current are of concern. This is why you want to avoid being the high point (avoid the bolt) and being further from a tall object (avoid the ground current). To reduce the chances of ground current affecting the whole group, it is advisable to spread the group members in the immediate area.

The strike danger zone for lightning has a radius of 10 kilometers. To determine this distance, count the number of seconds between the lightning flash and the thunder, and divide by 3. It takes 3 seconds for thunder to travel approximately 1km. Thus, if the thunder happens within 30 seconds of the lightning, then the storm is 10 kilometers from your location and you should find a safe location. It is recommended to wait for 30 minutes after the last thunder is heard to resume your activity.

e) **Snow and Ice:** Although this course is designed to prepare you for three-season events, it is still possible to find some snow or ice on a trail. If icy conditions are widespread, you will need to cancel your event since the complexity involved in safely managing such conditions is beyond the scope of this course. If the icy section is short, group management is your most effective tool to reduce risk. This means taking the time to:

- Ensure everyone is aware of the hazard, and what they need to do to ensure their own safety.
- Physically support anybody who does not have the balance to safely cross the slippery section.

f) **Heat:** Overheating can lead to heat exhaustion or heat stroke. Heat stroke is a dangerous condition that can lead to death. Consider canceling your event if Environment Canada's humidex is above 40. Defence against excessive heat includes:

- Seeking shade wherever possible.
- Drinking plenty of water and drinking often.
- Wearing light colored clothing.
- Avoiding strenuous exercise.
- Being alert to signs of participants developing heat exhaustion or heat stroke.
- Being aware that participants in poor physical condition are more vulnerable to heat.
- Knowing how to treat both conditions.
- Wearing a sun hat.

g) **Sun:** UV light from the sun can cause burns. Take and use sunscreen, since burning can occur even in overcast conditions. SPF lip balm may be required at higher elevations or

near reflective surfaces such as water. Sunglasses should be of high enough quality to protect against UV rays.

**Note:** This course certifies for three-season environmental conditions only (refer to the definition on P.4). Winter conditions significantly increase the complexities of outdoor events. Consequently, additional training is required for winter events.

### Quiz 5.2

- a) Good defences against rain include boots with good tread, raingear, and synthetic or wool clothing. True  False
- b) If you are hiking in trees you do not need to worry about strong winds impacting your event. True  False
- c) High points and flat open areas are bad places to be in an electrical storm. True  False
- d) Sunscreen is not needed on cloudy days. True  False
- e) High temperatures are never a reason to cancel an event. True  False
- f) Extra layers of clothing are necessary in cold weather when one is not moving around. True  False

### Wildlife Hazards

Hazards associated with plants and animals are mostly avoidable. Remember that Canada has a wide variety of ecosystems and you will need to research your area for additional information.

- a) **Large mammals:** Many people don't like to go to wild areas because of their fear of animals. This fear is largely unjustified and good practices can virtually eliminate the risk.
- **Bears:** The most effective defence against bear attacks is to travel in groups. Larger size groups that make noise are less likely to have a serious bear encounter. It is recommended to hike in a tight group of four or more. In areas where bear population are high, bear spray can be carried as an additional deterrent.

- **Cougars:** Cougars usually avoid people and attacks are quite rare. Defences against cougars include staying in a group, making noise, keeping children close, and having the last participant in the group be an adult-sized person.
- **Elk, moose, deer, etc.:** Large herbivores usually avoid people but can charge if they feel threatened, challenged or are protecting their young. Give large herbivores a lot of space (100 + meters), particularly males during the rutting season or females with calves.

b) **Wildlife-borne diseases:** Some serious diseases can be transmitted by wildlife.

**Ticks:** If there are ticks in your area everybody needs to know how to check for them after your event. Ticks are mostly active in the spring and effective defense include long pants, tucking pants into socks, light colored clothing and avoiding long grass. If bitten, use fine-tipped tweezers to grasp the tick as close to the skin's surface as possible. Pull upward with steady, even pressure. After removing the tick, thoroughly clean the bite area with soap. If Lyme disease is present in your area, the tick should be kept and sent to a laboratory and a physician consulted (this disease is relatively new in Canada and can often be overlooked or misdiagnosed by doctors).

- **Rabies:** This disease can be transmitted through the bite of a wild mammal. Although rabies infections are uncommon, untreated rabies will result in death, so anyone bitten by a wild animal must be promptly vaccinated.

c) **Poisoning:** Canada is fortunate in having only a few poisonous animals and plants.

- **Venomous snakes:** Rattlesnakes are limited to southern parts of the Canada. Their bite is serious but rarely fatal. Children are more vulnerable than adults. If you are in an area where they live, avoid disturbing them as they only attack when threatened. Stay away from places like long grass, brush, and rocks, where they may be resting. Wear stout, high-sided shoes, and long pants to help protect against a bite.
- **Poison ivy and poison oak:** These plants contain oil that create an unpleasant rash when touched. The effects are not immediately noticeable. Thus, a contaminated hand can spread the oil to other body parts or other participants unknowingly. The primary defence is recognition and avoidance. If contact is made with poison ivy or oak, wash contaminated areas with lots of soap and use calamine lotion.

## People Hazards

Hazards can also come from people within the group in the form of pre-existing medical conditions or inappropriate behaviour between participants leading to accidents.

- a) **Medical Conditions:** Prior to leaving, you should gather medical information about members of your group. The information should include the nature of the condition, how to recognize it, and how to treat it. Be aware that conditions like allergies or asthma might be triggered by conditions associated with the event (e.g. bees, pollen, overexertion, etc.). If medication needs to be taken, be sure you know where it is kept and that it is protected from excessive heat or cold.
- b) **Group Dynamics:** Group dynamics will impact how participants behave. Best defences against disruptive behaviors include knowing your participants, good communication, early recognition and appropriate group management (see chapter 10 for more information).
- c) **Slipping and Tripping:** Slipping or falling in Class 1 terrain is unlikely to cause a serious injury. However, it can result in minor injury or reduce the quality of the experience. Good footwear is an effective defence for this hazard. Defences used for snow and ice are also adequate (i.e. alerting the group, physical support).
- d) **Getting Lost:** Getting lost can have serious consequences. People, especially novices, can act in very irrational ways when lost. Participants need to be taught what to do if they lose contact with the group. In such case, they should stay where they are, do their best to remain warm, and make noise.
- e) **Transportation Hazards:** The most hazardous part of your event could be getting to the trailhead. If you are not using a transportation company, make sure your driver is aware of his/her responsibilities and has the proper licence.
- f) **Equipment Choices:** To help you prepare for most hazards you will encounter in terrain covered by the scope of practice of this course, you can refer to the equipment lists in appendix B & C. Keep in mind that not all equipment is equal and those that are poorly designed or are made of lesser materials may provide significantly less protection for hazards.

If you are relying on the participants to supply their own equipment, you need to take this into account. If participants come with ineffective equipment, you will have to reduce complexity.

### Quiz 5.3

- a) Tight groups of four adults or more are an effective defence against bears; children should always have an adult in close proximity. True  False
- b) You should leave 100m. between you and large animals. True  False
- c) Poisonous animals and plants are not common in Canada, so you do not need to defend against them True  False
- d) Being aware of interactions between participants is one tool available to help outdoor leaders manage conflict. True  False
- e) The quality of your participants' outdoor equipment must be taken into account when planning your activity. True  False
- f) Knowing the medical conditions within your group and what to do in case of need is important. This may require first aid training. True  False
- g) Educating yourself about specific regional considerations and hazards is a prudent practice as an outdoor leader. True  False
- h) Identify one hazard that is specific to your region and identify an effective defence you would use as a Field Leader.

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## Chapter 6

# Unexpected Situations

A complete event plan should help you prepare for unexpected situations. Such situations can have both a positive and a negative effect. Positive situations (rare wildlife sighting, teachable moments, etc.) should be enjoyed and integrated within the event. Other unexpected situations will have negative consequences on your event. However, with a good understanding of your objectives, participants, activity and venue, it is possible to turn some difficult unexpected situations (bad weather, tension in the group, etc.) into positive ones.

### Incidents, Accidents, and Emergencies

An incident is an unexpected situation that could have affected the event but did not. For example, a participant fell without hurting themselves. Whenever an incident happens, it is a good idea to stop, re-assess hazards and consider if the degree of risk has changed. Incidents are often signs that leaders need to adjust their defences to avoid further consequences.

An accident is an unexpected situation that had a negative physical or emotional consequence for a participant or the group. Accidents usually require immediate intervention and have a greater impact on the event.

Emergencies are unexpected situations that require immediate and timely intervention. Time is an important factor in emergencies. In such cases, negative consequences will increase if the access to additional resources, or care is delayed.

### Planning for the Unexpected

Part of your event planning should include information regarding the rescue options for your venue. For most of the country, search and rescue is the responsibility of the RCMP (OPP in Ontario, and SQ in Québec). Often, the RCMP works with local volunteer search and rescue groups. Some groups have extensive training and equipment while others don't. In some areas, search and rescue responsibilities are overseen by local land managers.

Calling 911 might not work in some areas. In other areas, calling 911 will delay the rescue as connecting you to the right group will take time. It is always recommended that you do your research prior to the event and bring important phone numbers. To find these numbers, you can

go on <http://sarvac.ca>. From this site, you will find contact information for your provincial or territorial search and rescue association. This association will be able to provide you with all the essential information for your specific venue.

Prior to leaving, your event plan should be left with a member of your organization who is not at the venue. This person should know your expected return time as well as the route(s) that the group will take and the activities that the group might conduct. If the group does not return by a pre-arranged time, this person can contact relevant authorities and initiate search and rescue response. It is not uncommon for groups to return late, so it is a good idea to include a buffer time before the person contacts the authorities.

Considering that the probability for minor injuries is still high in Class 1 terrain, at least one leader should have first aid training and the group must carry a first aid kit. Please note that the level of first aid training required of leaders is highly dependent on the context of the event. Consequently, the OCC does not make specific first aid training recommendations. Your organization needs to assess the context of the event and the level of care required. Your regional first aid training provider can be a useful source of information in this regard.

### **Managing Serious Accidents and Emergencies**

Serious accidents and emergencies are very rare in Class 1 terrain, but they do occur and can happen to anyone. Such situations are very stressful and challenging to manage. Including an emergency section to your event plan will improve your effectiveness if such a situation were to happen to you.

If you find yourself in this type of situation remember the following key points:

- No matter what has happened, the safety of yourself, your co-leaders, and the uninjured participants is your first concern. The situation will only become worse if more people get injured.
- If possible, assign a leader as a site commander who is in charge of the overall situation. This person manages the big picture. The site commander assigns tasks to others and ensures everything is taken care of. They should avoid providing first aid, or doing any other technical tasks.
- Provide first aid.

- Remember to take your time; slow is steady and steady is fast.
- Appoint a person to document in writing the history of injury or illness, first aid given, changes in the condition and log associated times.
- Assess if your group needs rescue or outside support. If contacting other agencies, mention your location, number of injured people, nature of the injury, group size, what you need, what you have done so far to address the situation and what resources are available to you. This order will ensure rescuers can find you if the line cuts. It also speeds up the rescue and makes it more effective.
- Contact your organization as soon as immediate needs are addressed. Inform them of the situation and to activate their communication plan.
- Remind your participants that they should not talk to any outside person except the rescue services. This includes social media. It is your organization's responsibility to communicate with the media, next of kin, and others seeking information.

## **Companion Rescue**

Sometimes, you may decide to initiate a companion rescue (use your group to evacuate the person) instead of calling for outside rescue. Before doing so, it will be important to consider how this will impact the group. Companion rescues can increase risks.

In general, there are three routes you can follow:

- If the injury is minor, you might be able to continue with the plan by giving the person some additional help (e.g. carrying their pack).
- You might decide to cut the event short and head out earlier than expected.
- You can split the group and have one leader, with a few helpers, do the companion rescue. This is the riskiest decision as it creates two groups, which are much more vulnerable than originally planned. Ask yourself:
  - a) Is the companion rescue leader able to cope with taking the injured person out?
  - b) Will the two groups be resilient should another unexpected situation occur?
  - c) Is there reliable communication available between the divided groups?

### Quiz 6

- a) In the event of an accident your first concern should be the person hurt. True  False
- b) In the case of a minor injury, you may be able to continue with your main event if your team is strong enough to send a leader out with the injured person without compromising the safety of the main group. True  False
- c) You can avoid all serious accidents if you plan your event well. True  False
- d) For a large group, the site commander should only give instructions to the rescuers and should not get involved in the mechanics of the rescue. True  False
- e) Little planning is required in case of emergency. You can always call 911 and they will send a helicopter True  False
- f) It is a good idea to re-assess hazards after an incident occurs. True  False
- g) During an emergency, your organization plays an essential supporting role. It should have a plan in place for such instances. True  False
- h) Your organization's emergency plan does not need to be tailored for outdoor events. All emergencies are handled the exact same way. True  False

## Chapter 7

### Event Planning (Building Teams)

A successful outdoor leader will work hard to build strong and positive relationships with the people and/or organizations that have a stake in the success of their events, the stakeholders.

You will be asking each of these stakeholders to contribute something to make your event a success. Each of them has something to gain or lose by providing that help. Your best strategy will be to understand and respect their interests.

This process should be viewed as a community-building exercise rather than a tedious chore. When done well, this results in a community working together to provide quality events.

#### Common Stakeholders

##### The Field Team

The field team includes you, your participants and co-leaders. To be effective, participants and co-leaders need to know what will be expected of them, and how to fulfill those expectations.

All members of the field team need to know basic information about the venue, the equipment, and meeting information. This process usually involves sending out equipment lists and schedules to participants and co-leaders.

Before the event, you need to make sure that everyone has at least a basic understanding of the objectives. This helps with mental and physical preparation. Additionally, everyone needs to know their what is expected of them and agree to this. This is particularly true of your co-leaders since you will have to rely on them. Explaining your expectations in the middle of the event is undesirable. It only takes one person who does not meet expectations to disrupt the event.

It is always a good idea to give participants an overview of the expected hazards and how to defend against them. This will also inform them about the risks associated with your event and help them decide if this event is right for them. This overview is preferably done verbally in a whole group setting, informed consent forms are useful but often not sufficient.

Finally, it is a good idea to inform participants that the event includes a reflection, an opportunity for them to share their thoughts with the group, so they can prepare any thoughts they might want to share.

## The Sponsoring Organization

Sponsoring organizations take many forms (e.g. school, hiking club, band council, guiding company, etc.). The organization you are working or volunteering for has considerable moral and legal responsibilities towards your event. This gives them many obligations.

The organization provides many of the resources you need for your event including financial and infrastructure support, insurance, permits, and training. It is important to develop a strong understanding of how your organization is structured so that events can be designed and delivered accordingly.

At times, administrative processes can hinder the delivery of your event. If this is the case, try to understand which organizational need is met by these processes. You will be able to effect change more successfully if you can offer an alternative way of fulfilling the same need.

Another important role your organization should play is that of supervision. Good supervision includes the following:

- Guidance and growth for leaders.
- A culture of learning and sharing.
- Support for leaders in their work and limiting unnecessary bureaucracy
- Data collection, monitoring, and reporting of field data to identify emerging issues and opportunities.

Unfortunately, this ideal type of supervision is not always present in a sponsoring organization and it will be your responsibility to advocate for quality supervision. We recognize that this can be challenging and recommend that you do your best to ensure good supervision. At times, peer supervision can be an effective alternative to formal supervision.

Most organizations use at least some form of paperwork as a communication and tracking processes. At times, leaders may find completing paperwork tedious. However, in addition to being part of a leader's responsibility, properly completed paperwork helps the organization offer good supervision. Additionally, it ensures due diligence was accomplished if an accident happens.

## **Parents and Legal Guardians**

When working with minors, children or youth, parents and legal guardians are important stakeholders to consider. At minimum, the parents' role is to help their child prepare. To do so, they will require access to information such as equipment lists and meeting times. Parents and legal guardians are also needed to give permission for their child to participate in an event. For this permission to be valid you must be able to demonstrate that parents (or legal guardians) provided informed consent. Usually, this is done by having parents (or legal guardians) sign a form that lists activities, hazards and the hazard management plan.

By engaging parents and guardians, you often gain their support for your program. A good starting point is to inform them how your outdoor event will benefit their child. Their support will make your program more resilient and sustainable. Some of the best outdoor programs engage parents throughout the planning process.

## **Transportation**

Your event may require a transportation company. If that is the case, you must make sure to provide the company with all necessary information about the event so that the schedule will go smoothly on the day-of. Often transportation companies are not aware of the specific requirements for outdoor events. The information you provide should include time and location of the event, contact information, as well as specific storage needs whether in or outside the vehicle, and contingency plans in case the event is cut short. Many transportation companies work with tight schedules. It will be important that your group is ready to leave on time.

## **Land Managers**

Some venues will be managed by specific organizations (e.g. Park, Crown, Band Council, etc.). Land managers are important stakeholders since they are responsible for the natural environments we visit. You should be aware of who manages the land, and what they expect of your group. Not respecting expectations can lead to conflicts, banned access, fines, etc.

## **Other Stakeholders**

Depending on your program and organization, there might be many other stakeholders influencing your event. A few examples are insurance companies, external funding organizations, equipment rental outlets, and other organizations that run events at the same

venue. You need to understand and respect their objectives. A common source of conflict is with other groups using the same venue. Ideally, you will be able to coordinate with their leaders and minimize potential conflict. The cooperation of these stakeholders is essential for the ongoing success of your program.

## **Building Teams**

A group of people working together as a team will achieve a much better result than a collection of individuals working independently on the same task. Strong teams are composed of people who trust each other, share a common objective, and are willing to make an effort to ensure it is successful.

Communication is an essential tool to build teams. Ideally, this process is a dialogue aimed at increasing understanding. When communicating face to face consider not only your words, but also your tone of voice and body language as they can send a very different message than what you intended. Be aware that many other factors (e.g. ambient noise, visual distractions, feelings of stress, etc.) can interfere with communication.

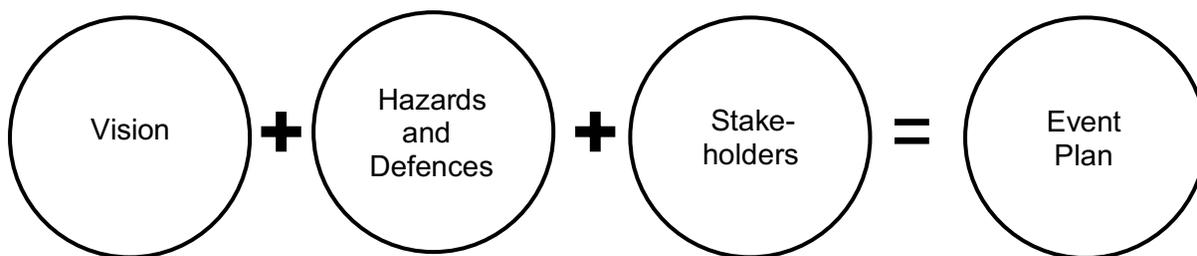
Ensure that both you and the various stakeholders are clear on what role each is expected to play during the event. Where possible, distribute roles amongst the field team members. It is often a good idea to delegate parts of the planning process to others. When people invest their time and effort into an event, their commitment increases.

Good feedback helps both personal and organizational growth and will increase group cohesion. For feedback to achieve good results it needs to be delivered in a positive but truthful way.

Team building requires constant work and attention. Your capacity to build strong teams will come with experience, reflection, and training. Remember, it is about the journey, not the destination.

## **Event Plan (Part Two)**

At this point in your planning process, you will be ready to include the additional information discussed above, such as a list of the main hazards and defense along with stakeholder information (e.g. signed consent forms, permits, and transportation information and agreements).



### Quiz 7

- a) Good team building increases commitment, quality, and safety. True  False
- b) Everybody on your team needs to have a clear understanding of their roles. True  False
- c) As you are the leader, it is your job to convince your participants to fit in with your plan to ensure the success of your event. True  False
- d) Effective communication with your sponsoring organization is an essential part of planning for your event. True  False
- e) Involving parents in your event is beneficial. True  False
- f) You do not need common understanding and clear communication with transportation companies. True  False
- g) Giving effective feedback is an easy process and does not require much thought. True  False
- h) Different land managers have different requirements. It is important to know what those are before going to a specific area. True  False
- i) Quality supervision promotes quality events. True  False
- j) Identify a stakeholder you work with regularly. Identify what their needs are and how you could address those as a Field Leader.

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## Chapter 8

### Environmental Responsibility

It is important that we are all responsible users of the natural areas we use for our events. Demonstrating respect to the environment will influence our participants to behave similarly. This is part of a Field Leader's responsibility.

Leave no Trace Canada is an organization that promotes the seven principles of Leave No Trace. The first of these principles is Plan Ahead and Prepare. As a graduate of this course you should have the skills to do exactly this. Part of that planning should include a consideration of how your event could impact the environment.

The Leave No Trace principles should not be interpreted by either your leadership team or your participants as a set of rules. They are meant to be ethical guidelines for your actions in the outdoors. Always be ready to explain your actions; leading by example and giving the reasons for why we do what we do in the outdoors can be a powerful educational experience.

The following guidelines have been adapted for use in this manual from materials provided by Leave No Trace Canada ([www.leavenotrace.ca](http://www.leavenotrace.ca)). Leave No Trace courses and *Skills and Ethics* booklets are available for a more complete discussion of the following principles.

#### The Seven Principles of Leave No Trace

##### 1) Plan Ahead and Prepare

- Know the regulations and special concerns for the area you will visit.
- Prepare for extreme weather, hazards and emergencies.
- Schedule your event to avoid times of high use.
- Scout your route to avoid getting lost.
- Ensure that the group's skills match the requirements of the activity

## 2) Travel and Camp on Durable Surfaces

- Durable surfaces include established trails, rock, gravel, or dry grasses.
- If the trail switchbacks, avoid creating or following shortcuts, this destroys vegetation.
- Never alter a site to suit your needs.

### *In popular areas*

- Walk in a single file in the middle of the trail, even when wet or muddy.
- Focus activities in areas where vegetation is absent.

### *In pristine areas*

- Disperse the group to prevent the creation of trails.
- Avoid places where impacts are just beginning.

## 3) Dispose of Waste Properly

- Pack it in, pack it out. Inspect your rest areas for garbage or spilled foods. Pack out all garbage, leftover food and litter.
- Use toilets where available. If not, deposit solid human waste in cat holes dug 20 cm deep at least 70 m from water, camp and trails. Cover the cat hole when finished.
- Pack out toilet paper and hygiene products.
- Avoid polluting water.

## 4) Leave What you Find

- Preserve the past, observe, but do not touch cultural or historic structures and artifacts.
- Leave rocks, plants and other natural objects as you find them.
- Avoid introducing or transporting non-native species.
- Do not build structures, rock cairns, or use flagging or marking paint.

## 5) Minimize Campfire Impacts

- Where fires are permitted, use established fire rings, fire pans or mound fires.
- Fires should not be lit on any type of vegetated surface. Put fires on bare mineral soil to avoid the risk of the fire spreading.
- Keep fires small. Only use sticks from the ground that can be broken by hand.
- Burn all wood to ash, put out campfires completely, then scatter cool ashes.
- Do not try to burn leftover food or other garbage that would have to be removed later.

## 6) Respect Wildlife

- Observe wildlife from a distance. Do not follow or approach them.
- Never feed animals. Feeding wildlife damages their health, alters natural behaviors, and exposes them to predators and other dangers.
- Protect wildlife and your food by storing food and garbage securely.
- Avoid wildlife during sensitive times, such as when mating, nesting, raising young, or during winter.

## 7) Be Considerate of Others

- Respect others and protect the quality of their experience.
- Be courteous, yield to other users on the trail.
- Step to the downhill side of the trail when encountering horses.
- Take breaks away from trails and other visitors.
- Let nature's sounds prevail. Avoid loud voices and noises.

### Quiz 8

- a) Teaching and practicing environmental responsibility is an essential part of our leadership role. True  False
- b) Making sure that you check weather forecasts and trail conditions ahead of time and making any necessary changes to your plans increases safety, quality, and helps you meet your responsibilities to the environment. True  False
- c) Keeping your distance from wildlife and keeping your food from them increases both your safety and theirs. True  False
- d) Established trails, dry grass, rock and gravel are all examples of durable surfaces. True  False
- e) If no bathroom facilities exist, it is acceptable to dispose of feces anywhere, and leave toilet paper hidden underneath a rock or dead leaves. True  False
- f) Flowers and other natural artifacts should be left where they are and observed without harm. True  False
- g) Fires can be lit anyplace, as long as you put stones around it. True  False
- h) If members of your hiking group are widely spaced, it is a good idea to yell back and forth as a means of communication. True  False
- i) In pristine areas, hikers should spread to reduce impact. True  False

## Chapter 9

### Last Minute Checks

During the planning process, you collected a great deal of information to be able go from the initial vision to the actual event. During the lead-up to the event, it is essential to check that some elements are unfolding as planned. This will help you detect issues and enable you to change your plans before problems arise. The timing of these checks will relate to how long a backup plan will take to put into action.

#### A Week Before

The condition of your venue can change depending on weather and wildlife behavior. Therefore, you will need to check trail conditions in the days ahead to make sure they remain suitable for your event.

Check the weather forecasts. Weather can vary greatly over a short distance. Thus, the forecast used must be as close as possible to the venue. Many events have been mistakenly cancelled or given the go-ahead based on the weather at a departure location (prior to travel to the venue) instead of the venue itself. If unsuitable weather is forecasted for your event, you need to have a backup plan. Many cancellations can be avoided by having a robust backup plan that is simple to implement and flexible enough to execute at the last moment.

This is also a good time to ensure that participants have acquired and packed the right equipment. How this occurs will depend on the group and event plan.

#### Within 24 Hours

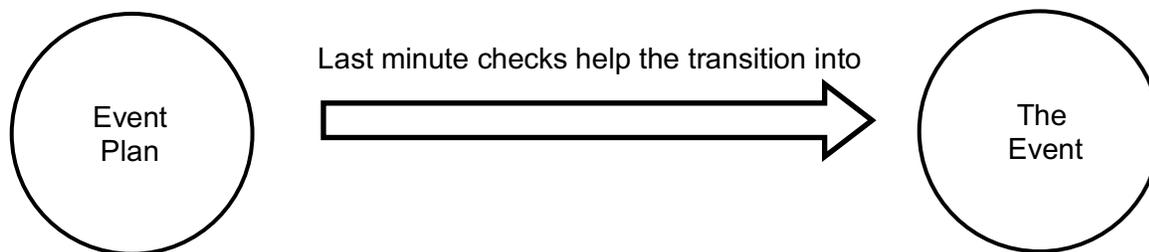
It will be important to do a last check to the weather forecast. Confirm that your event will not happen in a winter environment (refer to p.5 for a list of factors). In some instances, only one winter factor might be sufficient to cancel your event. Going into an environment that presents two or more winter factors is beyond the scope of this certification. In such a case, a Field Leader who is lacking additional winter training or experience should cancel their event. Even if you have appropriate training, it is recommended that you consult your organization and update your plans to ensure that your group is ready to face the challenging conditions.

Part of the last minute checks will include ensuring nobody is sick or has an injury affecting their participation. You may have to make the hard decision to ask a person to not come if their condition will compromise the objectives for the group.

Check that everyone has the right equipment. For older and more experienced participants this could be a verbal check. For younger people and beginners, you may need to visually confirm they have the right equipment. When appropriate, consider doing this the night before.

If you have co-leaders, you should schedule a face-to-face meeting to review the plan, the roles and responsibilities. This meeting should also allow for a discussion of any concerns.

Last minute checks enable a smooth transition between planning and delivering the event. Avoid finishing up details in the final day(s) leading up to the event, that should have been attended to sooner. Your ability to manage your group will be reduced and event quality will likely suffer.



### Quiz 9

- a) During the days prior to the event, you will need to keep a close eye on the weather because weather can be a powerful force, is highly variable, and can have a big impact on trail conditions. True  False
- b) Looking out of your window on the morning of your event will usually give you your most reliable indication about the weather for the day. True  False
- c) A solid back up plan can help you provide a good event even though the weather makes the main event unavailable to you. True  False
- d) When you have an experienced group and you have had excellent pre-event communication, you can skip the equipment check on the morning of the event to save time. True  False
- e) Last minute checks also include checking for recent injuries and sickness. True  False

## Chapter 10

# Group Management

Once the event begins, your best tool to ensure the delivery of a quality event will be group management. Good group management achieves four things:

- It keeps the group together.
- Ensures the participants are well informed.
- Ensures group & personal needs are met.
- It helps you prevent issues.

### Keeping the Group Together

Keeping your group together is an essential part of effective leadership. There are various strategies for mobile groups that are hiking from one place to another and for static groups that remain in a small area.

### The Mobile Group

The following strategies will help you keep a mobile group together.

- Groups should have a person out front who knows where they are going and a tail sweep who comes last.
- Exactly what 'staying together' means will depend on the nature of the group and the terrain. For young children, that may mean close enough to hold hands. For older, more experienced hikers, staying together may mean keeping within visual and/or verbal range of the participants in front and behind them and regrouping at regular intervals.
- Participants need to know that they must pass a message forward if they can't keep up or need to stop, or if they are losing contact with people behind.
- Since small gaps regularly happen in large groups, a fork in the trail may split the group. It is necessary to stop at forks until the tail of the group joins you before moving on.
- Every time the group stops – count heads. This is a great way to be sure that you have not lost someone since the last stop.

## The Static Group

The following strategies will help you manage a group on a static site.

- Make sure that everyone is clear about the site boundaries. Pay particular attention to any nearby areas that are either not Class 1 terrain (e.g. a river) or contain other hazards (e.g. a road).
- Everybody needs to be within verbal contact of the leader. Sometimes, using the buddy system (staying in groups of two) is appropriate for large groups.

## The Importance of Communication

Be careful to not under-communicate key information to your group. As you have planned this event it is very easy to overestimate what your participants know.

Over-communication can be a problem too. If you give a big speech before you leave the trailhead most of the information will never be received. A better strategy is to parcel out information over several stops, timing the delivery with relevant needs. For example, blister prevention should be taught in the first 10-20 minutes of hiking. Information concerning a lunch stop can be delayed until an hour before you get there.

As a leader, it will be your role to anticipate your participants' needs and let them know how to meet such needs. Knowing this information will reduce stress for participants and enable them to align with the activity.

## Pacing and Taking Care of Needs

You need to lead your group at the right speed (pace). If you start out too fast, you will exhaust the group early. This will make you slower overall, since the exhausted participants will move very slowly at the end of the day. If your pace is too slow, you may not have enough time to accomplish your objectives. An excessively slow pace might frustrate your participants.

The right pace is the one that is right for your *slowest* participant. For some, it may be frustrating to go this slow. However, you have no choice. Pushing a participant beyond their physical capacity will exhaust them. A good sign that you have the right pace is seeing participants talk to each other.

Finding the right pace for your group requires experimentation. First you must establish a pace and walk at that pace for a while. Then you should check to see how your group is managing. For younger groups this check can be mostly a visual scan of the group's performance. For older groups the pressure of wanting to fit in often means that people will appear to be keeping up even when the pace is too fast. To counterbalance this, you have to let them know why finding the right pace is important, and encourage them to let you know if the pace is too fast.

You should be monitoring the pace all day, with particular attention early in the day. Keep in mind that you will need to slow down while going uphill. Going slower than one's own natural pace is a skill. It is easy to resume our natural pace as our attention wanders to other matters.

The body does not work well if it is too hot, too cold, dehydrated or hungry. For your participants to get the most out of their day they need to be able to look after themselves with respect to these things. Since it may be difficult to change clothing or eat and drink while hiking, you will have to schedule breaks to allow participants to do these.

Your first stop should be about ten to twenty minutes along the trail. Inevitably there will be at least some participants who, in the confusion of leaving the trailhead, were not ready for the hike. This is their opportunity to get organized.

Participants also need use bathrooms during breaks. Where there are established facilities, these should be used. Where there are not, Leave No Trace principles should be respected. Going to the bathroom can be uncomfortable for participants not familiar with the outdoors. Some may try to avoid it, by holding it in and not drinking. This will affect their performance and dehydration can be an important issue. Keeping an eye out for these behaviors and providing reassurance will be your best tools in this situation.

### **Preventing Issues**

Many issues can develop while on an event. Participants can face physical or emotional struggles. In addition to the information mentioned above, you should implement the following strategies to reduce the likelihood of issues.

- Set clear expectations and rules and explain why they are important. It is not uncommon for novices to not know what is expected of them, or to not understand why these expectations are important.

- Offer some control over the outcomes and some free time. Participants are more likely to follow your instructions if they know how they can freely enjoy the experience. For example, you can give participants some unstructured fun time, or ask them to choose the destination.
- Educate participants about issues they may face (blisters, thirst, fatigue, etc.) and ask them to let you know if something is developing.
  - Blisters can be very painful. Often, participants are aware that they have a hot spot, but may not pay attention to it. By the time they feel pain, the blister has already happened. Remind participants to deal with hot spots before they blister.

Even with prevention issues develop. Monitoring how everyone is doing will help you manage issues before they become a problem.

- Be observant of how participants are behaving. Mood changes may be indications of fatigue, hunger, thirst or other issues.
- Be aware that people often talk in code. For example, the question “how long to the next stop?” often means “I need to stop to deal with something”.
- Don’t forget to monitor yourself. If you are cold, hungry or thirsty, chances are that many of your participants are, too.

Sometimes, these strategies are not sufficient to manage issues in the field. If this is your situation, you may consult the OCC website or contact us and we will assist you. On the OCC website, within the member’s section, you will find additional resources to help you in your role as a Field Leader.

## Managing Leadership Resources

Most events have more than one leader. This adds strength and resiliency to your group, and has the potential to increase complexity.

Observe the performance of your co-leaders during the event to ensure they are doing their job adequately. If not, you may have to remind them of it. If this strategy is unsuccessful, you may need to adjust your plan to compensate for this vulnerability. Your co-leaders are also a valuable source of information. Take the time to check in with them and ask them to let you know if they see issues developing.

### Quiz 10

- a) Over-communication will result in your group missing information, so a better strategy is to only give instructions when you see an issue. True  False
- b) While hiking, it is fine for older kids or adults to be out of sight and out of sound from each other for quite long periods. True  False
- c) If you give people too much information it encourages too much independence and this makes it hard to keep the group together. True  False
- d) As a leader, it is important to be receiving information from your group, so that you can deal with issues as they develop. True  False
- e) A hike runs more smoothly if everyone times their personal care needs to scheduled stops. Communicating how long it will be until the next stop during the previous one will help people manage this. True  False
- f) Since you let everyone know when the next stop will be you can safely assume that the person asks “how long to the next stop” just wasn’t listening. True  False
- g) Sometimes the people who are co-leading with you might not perform their role adequately. If a tactful reminder on the trail has no effect, there is nothing else you can or should do. True  False
- h) Encourage participants to speak up if they have an issue. However, also observe the behaviour of the group as some people may not speak up. True  False

## Chapter 11

### Situational Awareness

Being aware of what is happening in the surrounding environment is essential in effectively managing a group and delivering a quality event.

#### **Situational Awareness**

Situational awareness is an awareness of all that we know about the current situation and what we think will happen next. Since our perception is limited and often biased, and since situations are constantly changing, our situational awareness needs to be constantly re-evaluated. By doing this, we increase our chances of accurately assessing what is happening and adapting accordingly.

#### **Maintaining Situational Awareness**

During the event, you will be constantly taking in information by observing, listening and talking to participants and co-leaders while keeping an eye on the physical environment.

In previous sections, we discussed strategies for building situational awareness as it relates to ourselves (leader's motivation) and our group (vision, group management). In addition to this, it will be important to be aware of changes in the environment (e.g. weather, trail conditions, your group's location, etc.).

Look at the sky, make good use of open vantage points, look at people's faces and body language, ask questions, check to see if your original plan is still feasible. Doing this regularly will give you the most up to date information and enable you to react adequately.

#### **Maintaining Self-Awareness**

It is important to remain aware of your own state and needs. Your performance is essential to the success of the event and your needs must be met.

Skilled leaders are sensitive to this and actively ensure they perform as best as they can. Self-awareness is difficult to maintain. Some things you need to consider:

- a) Leadership can be quite tiring, and this may result in decreased performance as the day progresses. Unsurprisingly, most accidents happen in the afternoon as participants are also getting tired, and not as adaptable to changing conditions.
- b) Make sure that you take the time to look after yourself. In particular, look after your own food and water needs as diligently as you look after your group's needs. It is very easy to neglect yourself when your primary concern is your participants.
- c) If you sense that something is going poorly but you don't understand why, take a few minutes to stop and think. You may need to change your own behavior to fix the issue.
- d) Often, other members of the team are aware that you are struggling with your role before you. This is one of the benefits of having a strong leadership team where co-leaders can provide advice and can assume leadership if you need to step away from the role momentarily.

### **Maintaining Situational Awareness is an Active Process**

Most of our situational awareness happens at the subconscious level. This helps us accomplish routine tasks and frees our conscious mind up to do the important and creative things that make leadership interesting. However, this level of situational awareness is not sufficient for outdoor leadership.

The strategies found in the past two chapters will help you make situational awareness a conscious process. By doing so, you will be able to gather information, anticipate issues and avoid them. This requires effort and constant alertness.

### Quiz 11

- a) The better our situational awareness is about our group the more likely we are to have a safe, successful event. True  False
- b) Class 1 terrain is low risk, so you can concentrate on your activities without having to be on the lookout for potential hazards. True  False
- c) Familiarity with the route and knowing your group's location along it in relation to your event plan will help you stick to your planned schedule and/or respond effectively to the unexpected. True  False
- d) It is easy to neglect your own needs if your focus is always on your participants. Monitoring oneself is an important part of situational awareness. True  False
- e) Maintaining situational awareness requires constant alertness and asks us to keep track of our surroundings, listen as much as possible, recognize our internal state and remember our planned activities. True  False
- f) Name three elements that you want to be aware of at all times as a leader.

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- g) No matter what information you gather from the situation, you should never deviate from your plan. True  False
- h) Maintaining situational awareness is your responsibility. You should never rely on others to update your understanding of the situation. This is especially true of participants who are less experienced than you. True  False
- i) Choose an element that is challenging for you to maintain awareness about and identify strategies you can implement to make it easier for you to remain aware.

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## Chapter 12

# Reflection

Reflecting leads to better and higher quality leadership. It is central to the event cycle, providing leaders with the opportunity to learn from past events and to make changes accordingly in their future work.

- **Reflecting to Improve.** This type of reflection will help you determine if your objectives were met during the event and may alert you to issues that you were unaware of. Through this type of reflection, you can discover patterns, defend against associated hazards and improve quality. Conducting a formal debrief at the end of the event is a good technique to promote improvement.
- **Reflecting to Deepen Learning.** Reflection can enrich the participants' experiences and help them learn. For this type of reflection, you would typically lead a discussion focusing on key concepts or experiences (e.g. team building, local ecosystem, what have you learned about yourself today, etc.).

### Four Levels of Reflection

Ideally, reflection should happen at four different levels: of oneself, the leadership team, the participants, and the organization. Specific elements should be considered for each level.

1. **Self-Reflection.** Making self-reflection a regular practice helps build self-awareness and improves situational awareness.

However, self-reflection is challenging because of two reasons. First, learning and growing requires changes that can conflict with our self-image. And oftentimes, we as leaders might be reluctant to accept such changes. Second, our perception is filled with biases. Without outside input, these biases can lead to wrong conclusions and the overlooking of important information.

Some of the ideas for self-reflection should come from the results of the other levels of reflection that we will discuss below. These may uncover patterns that are hard to discover through self-reflection.

2. **Leadership Team Reflection.** This level of reflection is recommended whenever there is more than one event leader. The exchange of information allows for leaders to know

each other better and adapt their behaviour accordingly, resulting in a stronger team. Having a quick check-in after key activities is an effective strategy. However, it is important to keep these short as they can impact the event schedule.

3. **Participant Reflection.** Doing this with participants is an essential component of quality programming. Often, the leader will need to keep in mind that participants are not as invested in the objectives or the event as they are. This can lead to superficial answers from participants. Effective participant reflection requires effort. Building a culture of genuine discussion and sharing takes time. You might have to facilitate many discussions before you see participants share meaningful thoughts.
4. **Organizational Reflection.** This level of reflection is potentially the most challenging and, at the same time, the most useful for meaningful improvement. Since your organization's administrators are not part of the events, the only reliable way for them to learn is from the feedback that you provide. You have a duty to yourself, your organization, and your participants to provide this information.

Often organizations rely on paperwork such as event report, incident reports, leader's log book and participants' feedback forms for reflections at this level. For this reason, it is important for event leaders to tend to this aspect of their work, especially if there is an incident or accident during your event that can result in legal action. Developing a culture where such information is used to improve quality is one of the most effective approaches to defend yourself, and your groups, against hazards.

The current reality is that many organizations are very reactive, and the prospect of logging incidents results in more rules. This leads to reporting only what cannot be hidden. A practice that only delays the inevitable. Important incident patterns are missed, increasing the likelihood of accidents. It is your responsibility to work with your organization and create a culture where responsible reporting is rewarded instead of punished.

In addition to paperwork, organizational reflection should happen face to face. This will give you a chance to discuss specific topics with supervisors. Hopefully your organization meets these high standards, but even if it does not, you need to provide feedback as effectively as the situation permits.

In some instances, it is also useful to consider including other stakeholders in the reflection process. Including others' unique experience can give you useful knowledge. This will likely not happen after every event, but never including stakeholder's perspective is unwise.

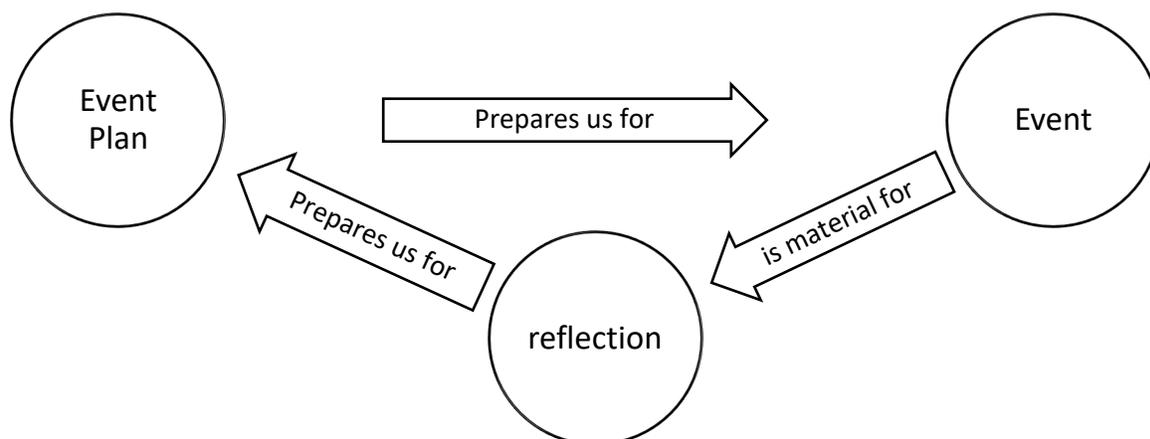
### Using Debriefing to Help Reflection

Debriefing is a group process that promotes reflection and strengthens relationships within the team. However, if not done properly, debriefing can be awkward and hurt feelings.

The role of the person running the debrief is to make space for others to share their opinion. As best as possible, this person should listen and only talk to facilitate discussions or clarify comments that have been made. Successful debriefing requires a structure, for example, focusing on key questions or topics.

Many of the leadership concepts presented in this manual, such as proper planning, situational awareness and group management will help you run good debriefs. If you are unsure about your debriefing skills, start small. Have a simple topic and see how it goes. Ideally, ask somebody to observe and give you feedback.

Promoting reflection is a complex leadership skill requiring effort and consideration. At first glance, it might seem a burden. However, reflecting helps create high quality events. Reflecting does not need to always be long and tedious. It will be important to use your judgment and make the right choices for your specific needs.



### Quiz 12

- a) Debriefing is a structured process for deciding who should collect praise and who should take the blame for what went right or wrong. True  False
- b) If nothing went wrong on your event, you can presume that you did everything right. True  False
- c) Reflection is best done over a few beers at supper time. True  False
- d) Good debriefing strengthens relationships and assists with learning. Poor debriefing may have the opposite effect. True  False
- e) Debriefing after an event helps both the leaders and the participants maximize their learning by reflecting on their experience during the event. True  False
- f) As an observant leader, you can always tell what other people are feeling by watching their behaviour during an event. True  False
- g) The information documented on various forms can be a valuable record that can help us work with our organizations to improve events. True  False
- h) Administrators have no idea what goes on in the field and so they tend to over-react to anything on a post-event form that could seem alarming. The best thing to do is to only pass on information that can't be hidden anyway. True  False
- i) Preparing your participants for a reflection by letting them know what to expect prior to the event can lead to better-quality discussions. True  False
- j) It is very difficult to be fully objective about our own performance. True  False
- k) Self-reflection can help us understand how our own personality influences our leadership style and these insights can help us maintain better situational awareness while in the field. True  False

## Appendix A

### Additional Guidelines for the Scope of Practice

A key intent of the OCC Scope of Practice is to connect the Field Leader with a broader community of outdoor practitioners. As a Field Leader, you have ethical and legal responsibilities towards your participants. Fulfilling those on your own without support is challenging and will likely reduce quality and increase risk.

When seen as a whole, the OCC Scope of Practice is a system of checks and balances increasing the likelihood that a mistake, or series of mistakes, will be corrected before affecting your events in negative ways.

The concrete implementation of the principles found within the Scope of Practice will vary depending on your context. This appendix intends to clarify these principles and give some guidance as to how they could be implemented.

#### What Should be in a Risk Management Plan

For this certification to be valid, you must operate under a risk management plan. In most cases, your organization will design most of this risk management plan. As the Field Leader, you will be expected to assess risk levels for hazards present during your event and follow the risk management plan.

Sometimes, you may not be working, or volunteering, for an organization (e.g. running local hikes for an online hiking group). In such instances, you will need to develop and implement your own risk management plan.

At minimum, a risk management plan should include the following components:

- Anticipated hazards for the event.
- Defences used to manage the hazards.
- Short description of skills required by the leaders for the event.
- Appropriate equipment lists for the event (incl. first aid).
- Emergency phone numbers for outside resources and description of the response capacity (e.g. search and rescue and their response time for your venue, etc.).

- Plan for field manageable accidents and non-field manageable accidents (e.g. communication expectation, exit points, etc.).
- Media communication plan.

This risk management plan must be written or reviewed by a competent individual. A competent individual is a person with relevant outdoor leadership experience and program management experience. If no person fits this description within your organization, the role can be separated between two individuals (i.e. an outdoor leader and a manager). If you do not operate within an organizational context, a local competent individual should be contacted to review your risk management plan. In case of need, the OCC can review risk management plans. However, other competent individuals outside of the OCC can be contacted.

### **What Constitutes Adequate Supervision**

Effective supervision is paramount to the Scope of Practice. However, the type of supervision you will have access to will vary depending on your context. To meet the requirements of the Scope of Practice, supervision must provide you with the following support:

- **Oversight:** If you make a mistake while planning, this can lead to negative consequences during your event. By having somebody oversee your event planning and delivery, you increase the likelihood that a potential mistake will be corrected in time. For this to be effective, the person providing the oversight needs to have sufficient knowledge to understand the particular context of your outdoor event. Additionally, some form of communication process must be developed to enable such oversight. For example, communication can be done through trip planning forms or in-person conversations.
- **Mentorship:** As you gain experience and grow as a leader, it will be important that you can access a person who can provide you with guidance. This person will need activity relevant knowledge (e.g. a hiker cannot really mentor a paddler). Furthermore, this person should be accessed directly. By that, we mean that mentorship requires direct engagement (e.g., 1-on-1, group conversations, phone conversation, etc.). Mentorship cannot happen through simply filling forms.

- Approval: In most cases, your events must be approved by a supervisor.
  - However, an exception can be made in cases where you are a volunteer leading events for adults (i.e. hiking club). In this context, approval is not necessary to respect the Scope of Practice.

The supervision requirements described above do not need to be all met by the same individual. What matters is that you operate in a context where there is oversight, mentorship, and in many cases an approval process.

### **What is a Respected Outdoor Leader (ROL)**

Simply put, a respected outdoor leader is a person with relevant expertise. Identifying this is highly contextual and will require some form of subjective assessment. However, the following indicators can help to ascertain if a person is a ROL:

- Other outdoor leaders would agree that this person has expertise. Essentially, this person has a good reputation within the greater outdoor community.
- The person has significant leadership experience in the terrain and with the demographic.
- The person has proof of training by professional outdoor organizations and/or by academic institutions and/or work experience with reputable organizations.
- Even if the person is not OCC trained, their behaviour aligns with the principles found in the event cycle.

Typically, a ROL will display all of the above indicators.

### **What is Appropriate Validation**

This course provides the foundational knowledge promoting quality and safety in class 1 terrain. Before leading others into higher class terrain, you will need to increase your competence as an outdoor leader and have it validated by a ROL. This will reduce the likelihood of going into more complex terrain before being ready due to skewed perceptions of your level of competence.

Validation must be done by a ROL who has relevant competency in the terrain class being validated. Also, ROLs should validate activities in which they are competent. Furthermore, the

ROL should include limitations to their validation. For example, a ROL could validate in class 2 terrain with teenagers, but not with seniors.

The exact implementation of validation will depend on your specific context. In general, appropriate validation will look like one of the three following scenarios:

- You lead events for an organization with a clear structure. Your supervisors and/or some of your colleagues are ROL. In these cases, the supervisor, or its delegate, will validate which terrain class you can lead in. Many professional outdoor organizations, schoolboards and camps operate in this context.
- You lead events for an organization with a clear structure. However, there are no ROL within your organization. In such cases, the validation process would be akin to an external accreditation process. An external ROL would review the organizational structure, risk management plans, communication processes, events within the organization. The OCC offers accreditation. However, external accreditation does not need to be done by the OCC to be within Scope. Many schools and camps and some hiking clubs operate in this context.
- You lead events where there is no formal structure. In these cases, validation will resemble an internship, or accessing mentorship with a ROL or within another respected organization. Many hiking clubs operate in this context.

As can be seen, validation is a process that overlaps risk management plan requirements and supervision. When adequately implemented, these three processes will provide you with additional layers of protection and are the foundation to a systemic approach to promoting event quality.

### **Additional Resources**

We recognize that even with the above information, additional guidance may be necessary to implement the principles of the Scope of Practice. If this is your situation, contact us and we will assist you.

## Appendix B

### Participant - Equipment List

A common issue for inexperienced participants is that they will have neither the suitable equipment for hiking nor the knowledge of what sort of equipment they should be bringing to the event. With proper education and preparation, most participants can find the necessary equipment. Remember that sports clothing made from synthetic fabrics can be appropriate for hiking.

#### **Clothing:**

**Footwear:** Must be closed-toed and provide good traction on a variety of surfaces. Water resistance and ankle protection is desirable for longer events. If you ask for true hiking boots, be aware that new or borrowed/rented boots may cause blisters. Typically, the blister problem is greater than the rolled ankle problem. Few day hikes in Class 1 terrain will require boots of this standard.

**Socks:** Cheap cotton socks are a poor option. Merino wool and synthetic socks marketed for industrial work are readily available at a reasonable price. Synthetic dress socks can be considered.

#### **Body Clothing:**

##### *Wicking Layer:*

If cold and/or rainy weather is expected, thermal underwear is required. Wool and synthetics are a good choice. Cotton significantly increases complexity since it soaks up water, is slow to dry, and fails to insulate when wet.

##### *Insulating Layer:*

Specialty equipment is the best option, but can be expensive. A pair of thick synthetic track pants (or two if it could be cold and wet) is a cheaper option for the lower body. A synthetic jacket or heavy wool sweater is a must for the upper body.

### *Water and Windproof Layer:*

If there is a possibility that your participants may be exposed to rain for half an hour or more, then a waterproof jacket is essential. In such a case, waterproof pants are desirable. For rain exposure in colder weather, rain pants are essential. Ensure that they are waterproof; it is easy to mistake windproof for waterproof. Participants often show up with winter ski clothing that looks waterproof but is not. Breathable waterproof clothing is typically the best when intermittent rain is expected. But for steady rain, fully waterproof clothing is substantially better.

**Hands:** A pair of gloves makes a huge difference during rainy weather even if it is not that cold. Wool, leather or synthetic fleece gloves are good options.

**Head:** For cold weather a toque and for hot weather a sun hat.

### **Other Equipment:**

**Day Pack:** 30-45 liters will be large enough for most events. It is recommended for participants to have their own. Sharing packs makes it harder to access food, water, and extra clothing if the group splits up. Equipment in the packs needs to be waterproofed if there is any chance of rain.

**Spare Clothing:**

Everybody should have at least an extra synthetic jacket or heavy wool sweater.

**Sunscreen:** Remind participants of application at regular intervals.

**Sunglasses:** Ensure UVA & UVB protection.

**Food & Water:**

Participants typically underestimate the amount of water they will need. This can lead to serious problems on a hot day. If water is not available on your route, they may need to bring as much as two liters each on a hot day.

Personal Medications:

If a participant has a life-threatening condition you should ensure you know this and how to help them should this condition develop.

Flashlight/Headlamp:

Especially if the days are short or your expected return time is two or less hours before sunset.

Hiking poles: Optional

Camera: Optional

**Not required:** Encourage participants to leave behind all phones, mp3 players, etc. Participants being plugged into external entertainment are less likely to engage with activities in natural areas.

## Appendix C

### Leaders - Equipment List

Leaders will need the same equipment found on the participants' list. The leader's equipment should be of good quality. They will also need additional equipment to help them deal with an emergency. This includes:

#### Communication Equipment:

The ability to contact the outside world is becoming a standard requirement. In many areas, there will be adequate cell phone coverage (ensure you have enough battery for the whole event). If not, you should consider other options. Two-way radios are good option if they will be able to reliably put you in contact with rescue services. In remote locations where radios are insufficient, you will need a satellite phone or a Personal GPS Tracker. If using the tracker, you will need to take the time to set it up on the Internet and familiarize yourself with how it works. Recognize that the GPS trackers do not allow you to communicate directly with rescue organizations so will probably not be appropriate if you don't have a risk manager to help organize and communicate with outside help.

**FRS Radios:** Small and inexpensive 2-way radios are an excellent way of keeping the lines of communication open between the leaders of a larger group.

**First Aid Kit:** Large enough to deal with common injuries, such as a large cut. Epi pens are also industry standard.

#### Repair Kit:

- A small roll of duct tape (will help deal with everything from a broken backpack strap to a torn rain jacket).
- Needle and thread.
- Lighter and fire starter.
- Multi-tool or pocket knife.

**Extra Clothing:** If you have an injured person that cannot be moved, you will need to have additional clothing over and above the extra jacket available for them so that their body temperature stays consistent (e.g. insulated pants and jacket, etc.).

**Sleeping Bag:** An over-bag, light sleeping bag, or synthetic blanket.

**Emergency Shelter:**

For an event that takes you more than thirty minutes from the road, you need an emergency shelter that can be used to protect your group from rain or wind and is strong enough to be used as an improvised stretcher for a short distance.

**Insulation:** A sleeping pad to insulate an injured person from the ground.

**Wildlife Deterrents:**

If wildlife is a concern, deterrents should be carried. Suggestions include bear spray, bear bangers, air horn.

**Throw Bag:** If travelling near the ocean a throw bag or rope should be carried.

**Log Book and Pencil:**

Should contain list of names, medical info for group, emergency contacts for group, etc. and space to record information.

**Emergency Response Plan:**

A copy is required in case you have a major emergency. Ensure that you have verified contact telephone numbers, radio frequencies, contact names, and appropriate resources in advance.

## Appendix D

### Event Plan Template

This template offers a structure for leaders who want to create a complete event plan. This template offers titles only. Some sections of the plan will only be a paragraph in length; other sections will be longer.

#### Vision

**Event Objective(s):**

**Participants' Considerations:** age, experience, medical conditions, fitness, etc.

**Chosen Activities:**

**Chosen Venue:** distance, total elevation gain or loss, water sources, shelters, fall exposure, route finding, etc.

**Schedule:** meeting time, travel times (inc. distances, elevation gain), trailhead organization time, specific activities with times, the route, lunch spots, decision points, return time (trailhead & base), Plan B.

#### Hazards

**Levels of Risk for Expected Hazards:** Risk = Probability X Consequence.

**Planned Defences:** equipment, communication devices, group management strategies, areas to avoid, etc.

**Emergency Plan:** phone number, response plan, rescue resources in event area.

#### Stakeholders

**Identifying Important Stakeholders:** transportation company, accompanying adults, rental outlets, etc.

**Important Considerations for Each Stakeholder:** deadlines to respect, phone numbers, key information to share.