

Chapter Six: Trip Planning

Section one: The Planning

Running successful trips while minimizing risk to everyone involved is done every day in COP. To do this, we follow three basic principles:

1. We plan carefully, trying to anticipate all likely circumstances.
2. We use documentation to help us make sure participants are aware of what they are getting in to, that we have acted prudently in our planning and so we can prove this if needed.
3. We follow up to get feedback that will make future trips better, and to determine the status of those participants who may have had an accident during the trip.

As a trip leader we face a choice; either predict and address problems at home in the quiet warmth of our living room, or somewhere on a mountain in a driving rainstorm with the sun going down. Obviously, good trip leadership begins with the former.

One convenient way to begin trip planning is to ask the classic questions who? what? where? when? and how? But the most important “w” question is Why?

Section 2: Why

Why you are going will help determine the answers to the other questions.

Are you interested in seeing a particular place? Looking for a challenge? Desiring a relaxed, laid back trip? Are you leading in order to have companions for a trip you wanted to do? Leading to “give back”? Leading development trips to give people the experience they’ll need in order to sign up for your advanced trips? You will save yourself a lot of aggravation if you know why you are doing this, and can explain it to potential companions.

Section 3: Who

- Is this trip planned for? What skill level do you expect? Is this trip for experts, for youngsters, for anyone? Many problems on trips come from participants that are not ready for the challenge that is given them. On the other hand, the Americans with Disabilities Act serves to remind us that we have a duty to accommodate anyone who is able to participate, and ask ourselves during the planning process

“Leadership is not just passed on from the more experienced to the less experienced. There are too many people with a lot of experience who don’t know what they’re doing. Some people say that experience is the best teacher. To heck with that. I know people who’ve been making the same mistakes for forty years.”

Paul Petzolt, founder of the National Outdoor Leadership School

how we might arrange the trip to be as inclusive as feasible. See Appendix for more about this.

- Is in charge of the trip? You are, though you might recruit co-leaders for parts of the trip you are not yet qualified to handle. It is the job of COP Activity Leaders to make sure trip leaders are qualified to lead the trips they propose.
- Will you call in case of emergency? Knowing the emergency services available in the area you will be touring can save precious minutes during an emergency. If you are involved in off-road activities, remember most 911 ambulance services stop at the road. You will need to know which agency to call for search and rescue in that area. In some areas it will be the sheriff, some places it will be the State Dept. of Fish & Game. Some areas have specialized search & rescue units you can call directly. You need to know who and how before you leave home.

It is also important to know who at COP should be contacted in case of an emergency. When you have a participant being life-flighted to a hospital, someone from COP needs to get to that hospital pronto. Meanwhile, you are still responsible to the rest of the group. Wouldn’t it be nice if the COP Risk Manager, President, or Activity Leader could arrange for a COP representative to go to the hospital for you? To assist with family notification? To go retrieve the bike that is now locked to a fence? To help the group deal with the trauma they just experienced? Again, planning beforehand to deal with the foreseeable problems will help you address them should they occur.

Section 4: What

- kind of trip is it? COP activities are varied, from bicycling and boating to rock climbing, backpacking, caving, square dancing, birdwatching, etc., and often combinations of several.
- Level of Difficulty do you expect? Very easy? Easy? Moderate? somewhat difficult? Very difficult?
- Factors explain this rating. Give callers a detailed description.

Examples:

For a 60 mile ride, is it rolling? hilly? Do you expect to hold a 10 mph pace or 20 mph?

We are traveling 100 miles over a period of 10 days. You expect to be walking 10-12 hours each day. You normally average 2 miles per hour on backpack trips, but expect to be much slower on this trip because of the steep 4-point climbs, river crossings, rough footway, etc. There will be no opportunities to leave the trail until the 80 mile point... Or, we’re going to this great campsite an easy 3 miles from the road. We’ll set up camp and spend the rest of the day hiking, fishing, reading, whatever the group decides to do.

- Are the potential risks the trip presents? A prepared leader can anticipate many potential risks: wet roads, heavy traffic, gravel, bears, big rapids, caves prone to flooding, etc.
- Can you do to eliminate or minimize risks? Often, dangers can be eliminated. On a bicycle tour, it may be possible to use another road that doesn’t have a dangerous curve.

Choose to explore a wet cave during a dry time of the year. Choose to top-belay a rock face known to have brittle rock. Set up rescue boats below a rapid that has turned boats over before.

- Some dangers cannot be eliminated without compromising the activity. If we were to avoid the risk of summer mountain snowstorms, of classified rapids, of caves with unexplored passages, we would never be able to experience the joy of personal discovery. Therefore, it is important to let participants know why and how you take preventative measures, and warn them completely and repeatedly about dangers you cannot eliminate.
- skills do your Participants bring to the experience? For example, knowing who is trained in first aid can help you deal with medical problems more efficiently. This can provide you with the benefit of a divergent talent pool among the participants
- skills do you need to recruit?
- What special skills are required? Do they need packline or cornering skills? River rescue? Ice axe experience? How can they gain these skills?
- Will you do for transportation? Sometimes the most difficult logistical chore a leader faces is getting the participants to and from the start of the trip, when this is part of the trip. The risks inherent in motorized transportation are well known.
- COP Liability Insurance does not include automobile insurance for COP volunteers while driving for a COP sponsored activity. We presume that each driver will have adequate insurance to cover his/her driving for this trip, and the cost of duplicating this coverage would be enormous. The COP insurance may, in some instances, provide secondary coverage in this area.
- Is the minimum Number of Participants you need to run this trip? Do you need a certain number of people to lower the risk?
- What is the Maximum number you can take? Is there a limit imposed by the road capacity? By the local managing agency? Amount of equipment available? Your capacity for managing people? Sometimes the limiting factor is the number of people willing to drive and their carrying capacity.
- Kind of equipment is needed? Helmets, life jackets, appropriate clothing, etc. are important parts of managing risk while running a trip.
- Equipment will you be providing? What equipment does each participant need to bring?
- Supplemental material will you need to give participants? For example, good maps or route descriptions can keep participants from getting lost, and will encourage them to learn map reading skills.

To paraphrase Judy Chicago, “the possession of a map suggests the use of a map”.

Section 5: Where

- Will you go? Good leaders contribute knowledge of the best places to experience their particular activity. All leaders share the joy of showing their participants a particularly beautiful trail, cave, set of rapids, or back country road. The appreciative comments of the participants as they share in this is one of the leader’s biggest rewards.
- However, you don’t want to get in a rut, or deprive yourself of experiencing new territory. While many organizations require their leaders to only lead where they have already been, COP prefers to leave that possibility open. We do expect you will research the area thoroughly and require higher skill levels of your participants. Be sure they know that you are in new territory.
- Will you eat? COP trips often feature great outdoor cooking, or visits to some great places to eat. Meal times can be the most rewarding social times, when everyone pitches in to cook and clean. Good meal planning makes things flow smoothly and pleasantly; poor meal planning can ruin a trip. Proper nutrition can also be an important safety consideration; undernourished participants may be prone to make poor decisions.
- On the other hand, some leaders prefer to leave participants on their own for food. Be sure they know this and what their options are. Encourage them to eat together to retain camaraderie and group cohesiveness. You don’t want to be discussing the next day’s plans with your dinner companions and leave the group that went to the restaurant out of the loop.
- Will you need to re-supply during the trip? If so, how? Is there a grocery on the way? Post office, motel or ranger station that will allow you to mail yourself a box of food?
- Will you find potable water? Do you need to bring filters? Is chemical treatment a better option for local conditions? Remember to remind your group to carry extra food and water.
- Will you sleep? Knowing of a great shelter does not help unless you know it will be open. Having alternative plans in place is critical.
- Will you meet? Nothing is more frustrating than waiting for the group next to the moss covered tree, only to find them later next to the OTHER moss covered tree. Knowing beforehand where and when you will meet, and making contingency plans, can save you a lot of grief.
- Are Emergency exit possible / Bailout routes? If there are problems/emergencies, where can you go for help? What’s your quickest, safest way to get there?
- Where is the nearest medical facility? You do not want to waste time driving in the wrong direction in search of a hospital. Be aware that some small town clinics do not accept walk-in, non-resident patients. They will tell you to go to a hospital. If you are lucky, they may help you arrange transportation to that hospital.
- Will any facilities you use require Certificates of Insurance? Request for Certificates of Insurance should be made through the office, well in advance of the event or activity.

A leader's obligation to an individual participant does not exceed his obligation to the participants as a group, and no single participant's actions should be allowed to compromise the safety of the trip as a whole.

December is the month the main list of requests is sent to our insurance company. You will need to provide the office with information including the name of the organization, mailing address, contact person, name and date of the event. The insurance company usually sends a copy directly to the entity in need of the certificate, plus a copy to the COP office. The COP copy is filed in the top drawer of the tan file cabinet in the Office Managers' office.

- Where will you find reliable information for this area? Activity Leader, other COP Leaders, Internet, Library, etc. Be creative. For very localized information try to make a contact in the community: a store, gas station, mom & pop motel. All can be quite helpful with information about local transportation alternatives, weather, resupply details, etc. A completed trip report from a previous trip to the area can be an effective planning tool for future trips, by providing information about the area, new ideas and outside expertise.

Section 6: When

- Will you go and return? Be realistic with your participants, as their plans depend on this as well. Don't plan to cover the return car trip of 200 miles in three hours. You may try to do so, and greatly add to the risk involved in the trip.
- Is also a question that applies to the safety of the trip. A winter trip into the mountains requires specialized gear, certainly carries a higher risk, and consequently a higher need for caution, than does a summer one. Therefore, knowledge of the weather you might anticipate is important.
- Might you cancel the trip? Will you go during inclement weather? Will you go if only one person signs up? Will you go if the dollar drops sharply against foreign currency? It is impossible to predict every possible circumstance, but some forethought should be given before you encounter difficult and/or stressful situations.



Doug Shroyer, Jim & Denise Badley, fall campout 2009. Photo by Glenn Beachy.

I finally figured out that a large part of my communication problem on trips was that I had assumed that all ten people sitting around the fire ring with me were part of the same conversation.

After some observation, I've concluded that any time the group size exceeds 6 people, you will effectively have 2 (or more) groups. Don't discuss group plans without making sure you have everyone's attention. - Ann Gerckens

Section 7: How

- Will you react to emergencies? It may be an injury. If so, it may require transport. It may be a discipline problem, or a lost participant or a widely divergent talent pool among the participants. Again, planning beforehand to deal with the foreseeable problems will help you address them should they occur.
- Will you keep track of your participants during the trip? In other words, know before the trip begins how you will actually manage the people on your trip.
- Will you convey information to participants? Verbal? Written? Telepathy? (not recommended)?
- Much will this cost each person? What does that fee cover? Do they need additional funds for meals/souvenirs, etc.?
- Will you pay for and track expenses? One of the most stressful parts of a trip can be the financial aspect, especially if the participants believe the cost is not being fairly distributed. Be open and honest with trip finances.
- Will you deal with problem participants? It may be necessary for you to remove or discipline a problem participant. Again, having a plan beforehand, and making sure that plan is understood, is your best tool to help you through this stressful situation. Some suggestions for dealing with people can be found in Chapter 8.

Section 8: Documentation

Gather this information for each trip to the degree necessary and practical to anticipate possible risks associated with the trip and to develop strategies to minimize or eliminate them. Writing this information down is a good idea. For re-occurring trips that do not change, such as weekly bicycle rides, one planning session is enough.

A written plan from a previous trip to the area can be an effective planning tool for future trips, by providing information about the area, new ideas and outside expertise.

Finally, a written trip plan can, in a court of law, show that you did the prudent planning that participants expect from COP trips.

"I've been guiding outdoors adventures for twenty-nine years, and of all the "people-type" problems I've seen, 99 percent were caused by breakdowns in communication."

Peter Whittaker, climber/guide



Section 9: Planning Checklist

- Why you want to go
- Where you want to go
- Risks
- Which risks can be mitigated and how?
- Which risks do you need to emphasize to participants
- What skills are needed?
- How can you and/or participants get them?
- What skills do you need another participant to provide?
- What happens if they don't show up?
- What gear is needed?
- Can you take beginners?
- How many?
- Permits needed?
- Reservations needed?
- What weather, terrain, animals can be expected in that place, at that time of year?
- What are your possible avenues of escape if the trip becomes too dangerous?
- Who can you call for help?
- Can you call for help? How?
- Transportation, if needed.
- Who knows where you are going? When you will be back? Who to call if you don't show?