

## Chapter Seven: Participant Screening

Generally, COP trips fall into one of two categories

1. Those that require a phone call or email to sign up
2. And those that don't. These list the meeting place and time so participants can just show up.

When you are running a hike or ride that doesn't require a prior phone call, it is important to scan the group for new faces.

Introduce yourself and strike up a conversation. The information you need to give and get is basically the same as for the prior contact trip (see below) but now you have the added distraction of the rest of the group milling around, and, possibly the added discomfort of refusing participation to someone who is already at the start point.

You need to give the entire group an orientation anyway, so call them all together and go over the where we're going, how hard, how fast, regroup points, cautions about specific hazards, do they all have food, water, bikes, boats, etc. Then you talk with the new person(s). Check if they have questions about the information you gave them. Ask them qualifying questions to be sure they are up to the task at hand. Take a look at their equipment. Is their daypack suspiciously light/heavy? Do they have adequate water and snacks? Are the hub nuts on their huffy rusted shut? How's the seat height look? Tire pressure? Are they dressed appropriately?

### Section 1: Info you need to GIVE

no matter what sort of trip you are leading

- Where you are going and when you expect to be back
- Expected Level of Difficulty! Give them a detailed description of why you give it this rating. See Chapter 6 for examples.
- Food and water plans - Remind them to carry extra food, water, and clothing
- What do they need to bring? Tools? Gear? Their brain?
- On trips that spread out, who to call in case of emergency.
- Your plan for leading the trip, keeping track of the group.
- Safety guidelines
- Risks, especially unusual ones

### Section 2: Info you need to GET on ALL trips

- Are they a member? If your trip allows non-members, encourage them to join. You may need to explain that while the road is free, the ride isn't. The leaders training, the liability insurance that covers that leader, the newsletter & website that ties the group together, they add up to a considerable cost.
- Do they have experience in the activity
- What is their skill level?
- Where have they been?
- What have they done, and How well did they do it? In other

**The purpose of screening participants is not to exclude, but to guide the person towards an appropriate, rewarding experience.**

words, if you are running a Yough trip, don't stop asking questions when the person tells you they have duckied it twice. Ask how they did. If they swam the loop both times, you will need to consider whether you have enough experienced boaters on the trip to handle fishing this person out at the bottom of every rapid.

Do they have any conditions that could affect their ability to participate (diabetes, asthma, allergies, etc)

- a. What triggers it?
- b. What plan does the participant have to cope with the condition?
- c. What are the signs and symptoms?
- d. What might you need to do if those signs and symptoms present themselves?

This can be a bit tricky because most of us have some pre-conceived notions about what people with conditions or disabilities can/cannot do. You cannot exclude a person from participating based solely on disability (or race, creed, sexual orientation etc.). Obviously, if they are in a wheelchair and have never been backpacking you would not automatically accept this person on your trip. But, you do need to treat them the same as other people who have no prior backpack experience i.e. suggest some day hikes of increasing roughness to give them some idea of what they are getting into. There are backpackers who use wheelchairs! And paraplegics doing big wall climbs, double amputees cycling and on and on.

When in doubt about anyone, guide them to an appropriate trip that would give them enough experience to have an idea of what they would be getting into if you accepted them on your trip. In other words they should walk before they run, day hike before backpacking, run class II water before Class III, bike 20 miles before tackling 50.

### Section 3: Additional Information to GIVE on trips that require prior contact

- How you are getting there? Can they drive? How many people can they take? How many boats /bikes/packs, whatever.....?
- How much will it cost?
- What does that cover?
- What are you providing?
- Are there other additional costs?
- Is there a circumstance under which the trip will be cancelled?
- Do they need to give you a deposit?
- If so, is it refundable? Under what circumstance?

## We were ALL beginners at some point

### Section 4: Additional Information to GET on trips that require prior contact

?Do they have their own equipment? They may need guidance on renting/borrowing/buying appropriate equipment.

?Have some ideas about what consists of appropriate experience before they start calling. Example: You are going on a desert backpack trip. Sure would be nice if they have prior desert experience, but living in Central Ohio, they probably don't, and how is anyone going to get experience if no one will take them on a trip? So, ask questions that would give you some clues about this persons' abilities. See example on the right.

#### We were all beginners at some point.

It is important COP Leaders make a place for beginners in our activities, but that doesn't mean we should take beginners on a high skill level trip. Sometimes you will be running a trip that is flat out inappropriate for a beginner. More often you will be dealing in shades of grey. So ask more questions.

- What is their fitness level?
- Do they participate in a similar sport?
- Do they understand they may not be able to quit if they decide this is not the activity for them?
- Do they understand you may not be able to get them out in an emergency?
- Do they understand that while cell phones can be a handy tool in an emergency, you cannot guarantee a phone will work, or that you will be able pick up a signal?
- Do they understand that while you are doing your best to run a "safe" trip, there are no guarantees of safety?
- Ask yourself if you think you can provide this person with a "safe", fun experience. Sometimes the answer depends on the other members who are coming along. Maybe you are running the type of trip where you can handle everyone being a beginner. Maybe you need a 1:1 ratio of experienced people to beginners. Maybe you need a 9:1 ratio. Whatever the ratio, try not to exceed it.

### Section 5: Refusing someone participation on your trip

A trip leader can refuse a person's participation if the leader feels that, from past experience, the person would constitute a safety hazard or diminish enjoyment of the trip.

*It is important that you inform the person of the reasons for the rejection and guide them toward appropriate action/trips.* This allows them to rectify the problem, allowing the possibility of personal growth and future participation. Saying the trip is full, when it is not, may be much more comfortable for you, but it denies the other person the opportunity to fix their problem so they can participate in future trips, not only yours but others too.

### Example:

#### Desert Backpack Trip Qualifier Questionnaire

How prepared are you for this somewhat difficult trip?

1. Have you backpacked in hot weather before?
 

Yes	(8)
No	(0)
2. Number of backpack trips you went on last year?
 

0-2	(2)
3-5	(6)
>5	(10)
3. Number of 1,000+ feet climbs last year?
 

0-5	(2)
6-10	(6)
11+	(12)
4. # of Backpack trips over 4 days in the last 3 years?
 

0	(0)
1-3	(5)
4+	(10)
5. Experience hiking 12+ miles per day?
 

0-5	(2)
6-10	(5)
11+	(10)
6. How often carrying 24 hrs worth of water?
 

Never	(0)
Sometimes	(6)
Regularly	(10)
7. Walked in uncomfortable weather: Rain, Windy, Cold, Hot?
 

Never	(0)
Sometimes	(6)
Regularly	(10)
8. Response to challenge?
 

Bail out right away	(1)
Walk 'til its really bad	(4)
Keep pushing on, but with an eye on group safety, bail if there's no safe alternative	(6)
Keep going no matter what	(0)
9. Sense of adventure?
 

Like things predictable	(0)
Accept the unusual	(4)
Seek the unusual	(8)
10. Safety Practices:
 

Do you stay hydrated	(3)
Stay fed	(3)
Always look where you are putting your feet and hands?	(3)

The points assigned to these answers are arbitrary, but reflect the values/concerns of the leader and give some clues as to whether this potential participant has any idea of what they are getting into.

## Section 6 : Checklist for screening- trips with no prior contact

### Information to get

Ask them qualifying questions to be sure they are up to the task at hand.

Look at their equipment:

- Is their daypack suspiciously light/heavy?
- Do they have adequate water and snacks?
- Is there equipment adequate for the task?
- Does the person appear to be familiar with the equipment?
- Are they dressed appropriately?

Are they a member?

- Encourage non-members to join.

Do they have experience in the activity?

- What is their skill level?
- Where have they been?
- What have they done, and How well did they do it?

Do they have any conditions that could affect their ability to participate (diabetes, asthma, allergies, etc)?

- a. What triggers it?
- b. What plan does the participant have to cope with the condition?
- c. What are the signs and symptoms?
- d. What might you need to do if those signs and symptoms present themselves?

### Information to Give:

- Where you are going, when you expect to be back.
- Expected Level of Difficulty and why you give it this rating.
- Food and water plans - Remind them to carry extra food, water, and clothing.
- What do they need to bring? Tools? Gear? Their brain?
- On trips that spread out, what to do, who to call in case of emergency.
- Your plan for leading the trip, keeping track of the group.
- Safety guidelines.
- Risks, especially unusual ones.

Ask if they have questions about the information you gave them.

## Section 7: Additional Checklist for trips with prior contact

### Additional Information to get

- Can they drive? How many people can they take? How many boats /bikes/packs, whatever.....?
- Do they have their own equipment?
- What is their fitness level?
- Do they participate in a similar sport?

### Additional Information to give:

- How you are getting there?
- How much will it cost?
- What does that cover?
- What are you providing?
- Are there other additional costs?
- Is there a circumstance under which the trip will be cancelled?
- Do they need to give you a deposit?
- Is the deposit refundable?

### Still more questions

- Do they understand they may not be able to quit if they decide this is not the activity for them?
- Do they understand you may not be able to get them out in an emergency?
- Do they understand that while cell phones can be a handy tool in an emergency, you cannot guarantee that the phone will work, or that you will be able pick up a signal?
- Do they understand that while you are doing your best to run a "safe" trip, there are no guarantees of safety?

### Can you provide this person with a "safe" fun experience? If not:

- Inform the person of the reasons for the rejection
- Guide them toward appropriate action/trips.

Don't forget to ask if they have questions about the information you gave them.

### Tip:

Keep a list of the trip particulars and a checklist by your phone