



ACC OTTAWA TRIP LEADER MANUAL

ACC Ottawa Executive Point-of-Contact

Bill Barrett

billb@alpineclubottawa.ca

Editors

Bill Scott, Hai Pham

guidelines@alpineclubottawa.ca

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Abstract. This manual provides organization, administration and policy information for ACC Ottawa Trip Leaders.

INTRODUCTION

Welcome from the Chair

The Constitution of the Alpine Club of Canada says what the ACC is all about: "The encouragement and practice of mountaineering and mountain crafts and the promotion of these skills through participation in the activities of the Club." In other words, we just want to get out there! And it all starts with the trip leader. Someone who has the desire and the initiative to get a bunch of people together to go somewhere together in the hills. If you are new to leading trips with the ACC, this manual is for you. The ACC would not function without people like you, so this manual has been written to help you get started. Here you will find checklists, information about the ACC executive and how they can help you, advice about how to run your trip, and advice about what to do if something goes wrong. We hope that after reading this, you will feel more comfortable and prepared for your plan to lead an ACC trip. Good luck, and have fun!

Acknowledgements

This work was inspired by similar Trip Leader manuals previously developed by other Alpine Club sections, most notably the Rocky Mountain and Calgary Sections. Many experienced ACC Ottawa Trip Leaders contributed to the development of this manual. We wish to acknowledge contributions from Adam Phillips, Alan Dimond, Bill Barrett, Bill Scott, Grant Blanchard, Hai Pham, Helen Tsai, Karen Choy, Stan Rosenbaum, Steve Dods. If we have inadvertently overlooked anyone, please contact the Editors who will gladly acknowledge the contribution.

Trip Leader Manual and Guidelines

This manual is one of two resource documents for ACC Ottawa Trip Leaders:

1) *A Trip Leader Manual* (this document) which is a consolidated source of information for Trip Leaders regarding club organization, administration and policy.

- [Introduction](#)
- [Quick Start Guide for New Trip Leaders](#)
- [Club Organization From a Trip Leader's Perspective](#)
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- [Leading in a Crisis](#)
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 - [Emergency Contacts](#)
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 - [Search and Rescue](#)
- [Liability Insurance and Waivers](#)
 - [Liability Insurance](#)
 - [Waiver Administration](#)
- [Incident Management and Reporting](#)
 - [Immediate Response in the Field](#)
 - [Post-Event Administration and Reporting](#)
 - [What Constitutes a Reportable Incident](#)
- [Travel in Avalanche Terrain](#)
 - [Avalanche Transceiver Policy](#)
 - [Winter Travel with Custodial Groups](#)
 - [Mountaineering and Alpine Backcountry Skiing](#)
- [Useful References](#)
- [Useful Links](#)
- [Definitions](#)

2) *Trip Leader Guidelines* (a companion document) providing "best practices" guidance for all those involved in running Section trips. Specific guidelines are tailored to each of nine trip categories. Each guideline is self-contained.

This manual and the associated Trip Leader guidelines are living documents which will be updated periodically based on experience, evolving best practices and club policy changes. Suggestions for improvements are welcome and can be directed to the Editors at any time.

The Point-of-Contact on the ACC Ottawa Executive for these documents is Bill Barrett. He can be reached at billb@alpineclubottawa.ca

To contact the Editors, email guidelines@alpineclubottawa.ca

A QUICK START GUIDE FOR NEW TRIP LEADERS

Introduction

After mulling it over for awhile, you've made the decision to become an ACC Trip Leader. Congratulations, and thank you on behalf of your Section. We know it's all a bit intimidating. We were there ourselves a few years ago. This section of the Trip Leader manual will lay out the steps involved in planning, organizing and running a typical club day trip - be it climbing, hiking, skiing, etc. Some trips will be more or less complicated than what is described here. For example, a return trip to a local climbing crag for the umpteenth time can be quite straight forward. Later, we'll provide the "fine print", such as details on club policies and standard practices. You can find activity-specific information for each category of club trip offered by ACC Ottawa in the companion Trip Leader Guidelines document. So, let's get started.

Trip Planning

- The first step is to come up with a trip concept. Make it an activity, location and route you are well familiar with. It is best to start with easy trips and work up to more adventuresome outings as you gain experience. Feel free to solicit ideas from and to bounce proposals off experienced Trip Leaders. They will be more than happy to assist. You may also be able to talk one of them into being your mentor while you learn the ropes.
- Select a date for the trip and, perhaps, an alternative in the advent of bad weather.
- Have a good idea of what you expect from participants in terms of fitness, experience, skill level, equipment, training, etc. Don't hesitate to seek advice from experienced leaders.
- Carefully consider the numbers of participants you will be comfortable leading on this venture. Small group sizes are more manageable in the beginning. Some activities have specific recommendations on group size (see the Trip Leader Guidelines). Additionally, some land managers such as national, provincial or state parks have group size limitations.
- Ensure you will have sufficient experienced assistants for the required "leader/participant" ratio, if guidelines specify this. Even if there is no specific guidance, it will be reassuring to have some experienced, familiar faces in the group.
- Consider enlisting the help of a co-leader. Many experienced Trip Leaders start from that point – getting a trusted co-leader on board – and then proceed from there.
- What essential items of personal and group gear will be appropriate? Do you anticipate using some of the [club gear](#)?
- Is there a need for pre-trip fitness or technical skill refresher training?
- Conceptualize how you would handle an accident. Can you expect cell phone coverage? If not, how would you handle communications in an emergency? Do you need to do some more research about the area of the proposed trip?
- Using previous e-letter entries as models, prepare and submit a trip notice to the appropriate Activity Coordinator. He or she will discuss details with you, perhaps suggest changes and, if your trip is accepted, publish the notice in the e-letter and on the web site.
- Depending on the novelty and complexity of the trip, anticipate a lot of email and phone enquiries from interested members once the event is publicized.

Screen Trip Participants

- Suitable screening of prospective participants has a big impact on the likelihood of success or problems in the field. As Trip Leader, you have full authority to screen participants as you see fit but must make decisions objectively and without personal bias.
- See [guidelines](#) for dealing with non-Section members, minors and other special cases.
- If the number of members interested in your trip begins to exceed your stated maximum, set up a waiting list. People can be fickle. Last minute changes are a common occurrence.

Event Co-ordination

- About 1-2 weeks in advance, send participants the trip details by email:
 - Event logistics i.e. meeting time & place, transportation, accommodation, meals, etc.
 - Gear, clothing and supplies appropriate for the trip
 - Include an e-copy of the waiver. Ask participants to read and sign it and bring their signed copy to the meeting place.
 - If the trip is in the US, remind participants to bring suitable identity documents.
- If appropriate, arrange to pick up whatever club gear you need. Check with the club Quartermaster or the leader who ran the last club trip. It may be necessary to resolve conflicts regarding the availability of club gear with other concurrent trips.
- In the week before the trip, monitor weather forecasts and then update participants:
 - Mid-week - update the weather forecast and give a reminder about the waiver.
 - 1-2 days before the trip - a final "GO, NO-GO" decision and any last minute details.
- Ensure a responsible person in town knows the destination and expected return time.

At the Meeting Place in Town

- Make introductions amongst the group.
- Ensure all participants read and sign the trip [waiver](#) prior to the trip. Collect and retain the signed waivers.
- Sort out car pooling, responsibility for club gear, need for specific items of personal gear.

At the Trailhead Parking Lot

- Check for stragglers.
- Communicate with participants: the route, what to expect, the anticipated finish time.
- Coordinate with assistant leaders about who's doing what.

At the Activity Location or Along the Route

- Brief participants on activity-specific safety hazards and safety procedures. For a climbing trip this would include areas of objective hazards where helmets are to be worn. For a hiking or skiing trip, it could include discussion of the route and the anticipated challenges. Explaining the "why" behind a desired course of action is always helpful.
- Engage other experienced participants to assist with supervising the activity. Don't lose sight of the big picture. You are responsible for overall supervision.
- Where circumstances permit, mentor less-experienced participants on proper technique.
- Don't get so focussed on your responsibilities that you forget that the purpose of the whole exercise is for everyone to have a good time. That includes you!

Wrapping up the Event

- By monitoring participants, weather, time of day and conditions, determine an appropriate time to wrap up the event.
- Leave the activity site or the route cleaner than found.

At the Trailhead Parking Lot

- Check for stragglers.
- Retrieve ALL the club gear while you have the group together. (Trying to collect missing gear after everyone disperses back in town can be a real pain.)
- In cold weather, make sure everyone's vehicle gets started.
- A brief social gathering over a beverage on the way home can be a great way to polish tall tales about the day's adventures, to cement bonds with future trip mates and to gather feedback on how the trip went.

Post-Trip

- Pass signed waivers to the Activity Coordinator at the earliest opportunity.
- Clean and return club gear to the Quartermaster.
- Encourage a participant to submit a trip report and/or photos to the e-letter.

Conclusion

Congratulations on a trip well done. Kick up your feet and have a cold one. Now, let's flesh out a few details.

CLUB ORGANIZATION FROM A TRIP LEADER'S PERSPECTIVE

Contact information for the Section Executive can be found [here](#). Trip Leaders interact mainly with the following Executive members: Activity Coordinators, Quartermaster, Training Coordinator, Safety Coordinator, E-letter Editor and Membership Coordinator. Their trip-related duties are briefly described below.

Activity Coordinators

Three Activity Coordinators sit on the Section Executive, with responsibilities as follows. Each Activity Coordinator is supported by a committee of experienced volunteers.

- 1) Hiking
 - hiking and backpacking (both frontcountry and backcountry)
 - Nordic skiing and snowshoeing (both frontcountry and backcountry)
 - downhill/alpine skiing (by definition, on-piste skiing at lift-served ski centres)
- 2) Climbing
 - technical rock and ice climbing (including bouldering, cragging, sport, trad and multi-pitch climbing)
- 3) Mountaineering
 - scrambling and mountaineering (summer and winter)
 - alpine backcountry skiing

Trip Leaders are encouraged to develop specific trip concepts and to discuss their proposal with the responsible Activity Coordinator. The Activity Coordinator will review, vet and refine the trip proposal in consultation with their supporting committee and the Trip Leader, as appropriate. Once finalized, he or she will post the trip notice to the e-letter and web site.

Activity Coordinators' Role

Acting on behalf of the Executive, Activity Coordinators are responsible for:

- 1) recruiting, developing and mentoring new Trip Leaders in their activity field,
- 2) promoting Trip Leader training in conjunction with the Training Coordinator,
- 3) personally developing trip concepts and soliciting trip proposal development from the pool of Section Trip Leaders in their activity field,
- 4) assessing specific trip proposals (see below) and providing guidance to Trip Leaders on refining trip proposals,
- 5) posting trip proposals to the e-letter and web site, and
- 6) resolving problems with trips, participants and leaders, as and when appropriate.

In reviewing trip proposals, the Activity Coordinator will consider a number of questions with the assistance of their supporting committee:

- 1) What is the audience of the proposed trip?
- 2) What are the objectives of the proposed trip?
- 3) Does the experience and skill level of the Trip Leader match the proposed trip?
- 4) What is the required skill and fitness level of the participants?
- 5) Are there any experienced members available to assist? (It is advisable for trips to have a minimum of two experienced members – the Trip Leader and an assistant leader.)
- 6) Are the objectives of the trip appropriate for:
 - a. The experience level of the Trip Leader(s)?
 - b. The experience level and fitness of the participants?
 - c. The ratio of participants to leaders?
 - d. The total size of the party?

The Activity Coordinator will communicate any concerns regarding the proposed trip with the Trip Leader and make constructive suggestions for changes, where appropriate. The Activity Coordinator and the Executive retain the authority to approve or reject any trip proposal.

Quartermaster

The Quartermaster manages the acquisition, storage and care of Section equipment. Items are acquired or replaced with funding from the Section budget, as well as occasional donations in kind from organizations and individuals. With input from the Activity Co-ordinators, the Quartermaster sponsors a line item in the annual Section budget for gear acquisition and replacement. Trip Leaders should communicate issues, concerns or suggestions regarding gear to the appropriate Activity Co-ordinator and Quartermaster.

Section gear is held by the Quartermaster. The club climbing gear is housed in a locked outdoor storage unit accessible from the street. Trip Leaders can obtain location details and the combination from the Quartermaster. First aid kits and high value items are stored elsewhere and can be obtained from the Quartermaster.

Training Coordinator

The Training Coordinator plans and implements training courses and clinics for Section members. This includes courses given by professional instructors as well as clinics offered by Section members with particular skill and experience in various areas. The Training Coordinator sponsors a line item in the annual Section budget for training. This is the single largest annual expenditure by the Section. The Training Coordinator is also the contact point for information about courses offered by ACC National.

Safety Coordinator

The Safety Coordinator is responsible for:

- 1) Promoting a safety culture within the Section.
- 2) Providing an independent safety sanity check on Section activities. This means the courage to speak up in the face of serious safety issues and to insist on resolution of problems.
- 3) Devising and putting into place emergency response measures.
- 4) Organizing and administering first aid and emergency response training.

The first two are in the realm of prevention which is, after all, the best strategy. The third encompasses measures to enable our leaders and our members to handle accidents in an appropriate manner when prevention fails.

Finally, the Safety Coordinator organizes and administers first aid and emergency response training – both of which are important components of the Section’s risk reduction and mitigation strategy.

Membership Coordinator

The Membership Coordinator handles administration related to Section membership. He or she has access to the ACC National membership database and can confirm the membership status of an individual with respect to the ACC and the Ottawa Section.

E-letter Editor

Besides editing the e-letter, the Editor posts trip notices to both the e-letter and the web site based on input from Trip Leaders and guidance from the responsible Activity Coordinator. The e-letter Editor also has access to the membership database.

TRIPS, TRIP LEADERS AND TRIP PARTICIPANTS

How to Become a Trip Leader

The Section is always looking for new Trip Leaders. If you think you are ready to make that transition, talk to the responsible Activity Coordinator. They will answer your questions about what is involved and provide guidance on the mentoring and training support available.

The basic steps to becoming a Trip Leader are as follows:

- 1) Get training appropriate to the activity.
- 2) Raise your skill and experience level by getting some mileage under your belt.

- 3) Volunteer to assist an experienced Trip Leader and ask for their mentorship.
- 4) Propose a trip and ask an experienced Trip Leader to be your assistant leader.
- 5) Work with experienced Trip Leaders and the appropriate Activity Coordinator to develop your skills and experience. When the Activity Coordinator is confident that you have demonstrated adequate experience and ability, you will be accepted as a full leader.
- 6) Start by leading easy trips with a small number of participants and then build to more difficult trips.

It is important to be honest about one's motivation in seeking to become a Trip Leader.

DO NOT Become a Trip Leader If...

- You have something to prove.
- You don't take constructive criticism well.
- You are not open to learning new skills – you already know everything there is to know.
- You are looking for a date.
- You want to be the hero.
- You want to prove your climbing/skiing/hiking prowess.
- You have a need to show-off.
- You want the adulation of others.

But, Please DO Become a Trip Leader If...

- You have skill and experience in any of the activities of the Alpine Club.
- You enjoy sharing your passion for the outdoors with others.
- You enjoy volunteering and making a contribution to your club.
- You enjoy working as a team.
- You have a strong commitment to protecting the wilderness environment so that it will be available for generations to come.
- You enjoy the challenge and rewards of leadership.
- You are open-minded about constructive feedback.
- You are committed to continuing self-improvement of technical and leadership skills.

Trip Leader Vetting

Trip Leaders are the Section's most valuable and appreciated asset. They represent the core of the organization. Trip Leaders are unpaid volunteers who donate their time, energy and expertise to plan, organize and implement trips for the benefit of others. We should take advantage of every opportunity to personally express our support and appreciation to these dedicated volunteers working on our behalf. The Section will continue to devote substantial effort and resources within its means to Trip Leader development, mentoring and support.

Without Trip Leaders, we wouldn't have a Section. That being said, trip leading is a privilege, not a right. The authority to grant or to revoke or to attach conditions to trip leading privileges rests solely with the elected Section Executive who are accountable to the membership for the safe and harmonious operation of the Section. Trip leading privileges will not be arbitrarily constrained or revoked. Should problems arise, they will be dealt with transparently and discretely by the Section Executive in a timely manner, following due process with the

objective, if possible, of resolving problems to the mutual satisfaction of all involved. In doing so, member safety will be an overriding factor.

Trip Leader's Authority

A Trip Leader's authority includes:

- 1) developing all aspects of the trip plan, including objectives, routes, acceptable number of participants, required experience, fitness, qualifications and equipment, logistics, cost sharing and other factors
- 2) assessing the suitability of potential participants' experience, training, expertise, fitness, equipment and personal compatibility with trip objectives and team composition
- 3) screening and accepting or rejecting applications to join a trip
- 4) asking or requiring, if necessary, participants to refrain from activity which is contrary to club policy or which might endanger themselves or fellow participants or disrupt the trip
- 5) changing trip plans before or during a trip in the interests of safety, trip enjoyment, logistics or other factors

Resolving Problems with Trip Participants

The Trip Leader has full authority to run all aspects of an official club trip and, provided they exercise their authority in a reasonable manner, will have the full backing of the Executive. Trip Leaders are encouraged to handle problems with participants directly one-on-one during the trip. Most problems are best resolved face-to-face, discretely if possible, and in a timely manner. If a participant's behaviour continues to be problematic, the Trip Leader should communicate the facts to the responsible Activity Coordinator, at which point it will become the responsibility of the Executive to deal with the matter.

Resolving Problems with Trips or Trip Leaders

Serious problems with trips or Trip Leaders should be rare. However, if problems arise on an official ACC Ottawa trip, a general procedure for resolving the matter is as follows:

- 1) Participants who have concerns about a trip or Trip Leader are encouraged to address their concerns directly with the Trip Leader either during or immediately after the trip. This should be done in a calm, mutually-respectful manner and in private, if possible.
- 2) If reasonable efforts to resolve the issue directly fail to resolve the matter to a trip participant's satisfaction, they can raise the matter to the attention of the responsible Activity Coordinator. This is best done in person, if possible, else in writing. The Activity Coordinator will investigate the matter, consulting all relevant parties (including the Trip Leader in question), make a decision and inform those involved.
- 3) Finally, if the preceding steps fail, the Activity Coordinator will report the concerns to the Section Chair. The Chair will appoint an advisory committee (which may include experts outside the Executive) to investigate and make recommendations. The Executive will review the committee's findings and vote on the recommendations. The Executive's decision will be final and binding on all parties.

The formal process outlined above should rarely be required. Most problems are best resolved by calm, face-to-face, good faith and timely discussions between the parties involved. Experience has shown that it is a really bad idea to engage in email flaming wars which invariably lead to miscommunication and serious unintended consequences.

SAFETY

While individuals in leadership roles have specific safety-related duties, safety is the really the collective responsibility of everyone in the club – the Executive, Trip Leaders and trip participants.

Trip Leader's Role in Safety

A Trip Leader's principal safety-related role is ensuring the safety of trips that he or she runs. The best way of achieving this is through:

- Good planning
- Appropriate participant screening
- Conservative approach to trip execution
- Showing good judgment in adapting "best practices" as outlined in the companion Trip Leaders Guidelines document
- Heads-up oversight in the field
- Willingness to change plans in the face of adverse conditions or trip participant issues
- Willingness to speak up in the face of safety issues, even when this is controversial
- Commitment to progressive improvement of personal leadership and technical skills
- Receptiveness to constructive criticism and feedback

Trip Leaders should feel empowered (in fact, it is a part of their duties) to draw safety issues to the attention of the Executive through the Activity Coordinators and the Safety Coordinator.

Activity and Safety Coordinators' Roles

[Activity Coordinators](#) and their supporting committees are the club's first line of defence for vetting trip proposals and overseeing trip safety. They are also the first point of contact on the Executive for reviewing complaints about trips and Trip Leaders. Other members of the Executive are also expected to speak up if they have concerns regarding safety. However, the dynamics of volunteer organizations can hamper and delay responses to problems.

Consequently, part of the [Safety Coordinator's](#) explicit role is to act as an independent voice of second thought and to speak up about perceived safety and risk management issues in any area of the Section's activity. This may be challenging as it inevitably involves potentially controversial challenges to ingrained practices of individuals and the organization as a whole.

Executive's Role in Safety

Ultimately, the Section Executive is collectively responsible for safety on club trips.

CLUB GEAR

The [Quartermaster](#) is responsible for managing club gear.

Club Gear Inventory

ACC Ottawa maintains a small inventory of gear to support club events - notably climbing, hiking, skiing and mountaineering trips and camps. The goal is to save wear and tear on Trip Leaders' personal gear. It is not intended to be borrowed or rented by members for their personal use. The gear inventory varies somewhat over time. Find current holdings [here](#).

Policy on Club Gear Usage

The policy on usage of club gear is as follows:

- Club gear is available for use by Trip Leaders for official ACC Ottawa trips, courses and clinics i.e. events advertised in the e-letter and on the web site.
- Club gear is not available for use by Trip Leaders or Section members on unofficial trips or personal outings.
- Club gear is available to Trip Leaders on a first-come-first-served basis. Where booking conflicts arise, Trip Leaders are expected to co-operate to best serve Section interests.
- Trip Leaders should return club gear to the Quartermaster in a timely manner for it to be used on the next club outing. Returned gear should be clean, dry and in good repair. Report issues of significant loss, damage or consumption.

TRIP LEADER TRAINING

The [Training Coordinator](#) is responsible for planning and implementing Section training courses and can provide information concerning courses offered by ACC National.

The North Face (TNF) - ACC Leadership Program

One week TNF-ACC mountaineering leadership programs are offered in summer and winter by ACC National. These outstanding courses are heavily subsidized by TNF and the ACC. Applicants must be current, active ACC Ottawa volunteer Trip Leaders. A continuing commitment to organize Section activities is expected of all course attendees. Applicants must apply to ACC National and be sponsored by their Section. Interested members should contact the appropriate Activity Co-ordinator or the Training Co-ordinator. Find out more about the [TNF leadership program](#).

Wilderness First Aid Training

As a consequence of lessons learned from several serious (but thankfully non-fatal) accidents, the Section emphasizes wilderness first aid training for Trip Leaders and, to the extent practicable, for active Section members. These experiences also led to several other safety-related initiatives, including adoption of an [Emergency Response Protocol](#). Experience has shown that wilderness first aid training has many advantages for our Trip Leaders:

1) *emergency response skills*

It provides leaders with the knowledge and skills necessary to respond to backcountry accidents and medical emergencies.

2) *confidence*

Prospective leaders can be hesitant to volunteer due to a lack of self confidence in their ability to respond to a backcountry emergency. Training removes that hurdle.

3) *prevention*

Most people who have taken wilderness first aid training have the same response - "I'm glad I took this course but I don't want to have to do it for real". Consequently, we find that wilderness first aid trained leaders are more conservative and safety conscious in how they conduct their trips. Prevention, after all, is the best strategy.

Consequently, the Section devotes a substantial portion of its annual operating budget to subsidized first aid training. Specific guidance on first aid qualification levels for Trip Leaders and participants is provided in the companion Trip Leader Guidelines document.

Other Trip Leader Training

Within its budget capacity, the Section may offer other subsidized Trip Leader training from time-to-time. See the Training Coordinator and Activity Coordinators for details.

Policy on Training Subsidies

ACC Ottawa has a modest budget for training subsidies. A substantial portion of the budget is directed to subsidize Advanced Wilderness First Aid (AWFA) Training. Training subsidies may also be available for other leadership, safety-related and technical training. Training subsidies will be offered to the following, in priority order:

- 1) Trip Leaders with an established track record of leading past club trips
- 2) new Trip Leaders who make a credible case for leading future club trips
- 3) Section volunteers with an established track record of volunteering for the club
- 4) active Section members with the potential to become future Trip Leaders

Training subsidies are administered by a sub-committee of the Executive, chaired by the Training Coordinator, with the Activity Coordinators and Safety Coordinator as members. The sub-committee operates by consensus. The sub-committee will collaborate on preparation and submission of a consolidated training subsidy amount for the annual Section budget. The sub-committee will announce opportunities for subsidized training from time-to-time and solicit applications. Questions and proposals regarding training subsidies can be directed to the Training Coordinator or any member of the sub-committee, as appropriate.

Recipients of training subsidies are expected to commit to continue leading club trips or continue volunteering for the club in the future.

SCREENING TRIP PARTICIPANTS

This section provides guidance on screening trip participants and covers a number of special cases such as non-ACC members, non-Section members, minors, custodial groups, US citizens and special needs members.

The Screening Process

An important part of a [Trip Leader's duties](#) is assessing prospective trip participants – specifically, their experience, training, expertise, fitness, equipment and personal compatibility. How this is carried out can have a big impact on the likelihood of success or problems in the field. Trip Leaders are expected to make these decisions objectively and without personal bias. It is not acceptable, for example, to fill a trip with your buddies, then announce it and declare the trip full. Doing that is OK for a private trip, but not for a club event.

When the nature of the trip warrants it, ask prospective participants to provide reasonable information regarding how they meet the specified criteria. This might include references from previous trips with other leaders. Be prepared for some individuals to duck questions, provide incomplete answers or exaggerate their experience and qualifications. Be persistent on issues that matter. Choose your battles. When appropriate, contact the Activity Coordinator or other Trip Leaders for their assessment, experience with and advice regarding prospective participants unknown to you.

A decision to reject an application to join the trip should not be arbitrary. Your reasons should be explained politely and privately. Specific and constructive suggestions should be offered regarding alternative outings or training more suitable for the member's fitness, skill or experience level.

Where appropriate, ask prospective participants to share critical medical information in confidence with you as Trip Leader. (This will be mandatory for major ACC trips and camps.) The type of information desired relates to medical conditions which could put the individual or other participants at risk, such as serious allergies, asthma, diabetes, seizures, cardiac conditions, etc. Similarly, ensure individuals share with you where they carry medical devices and supplies relating to such conditions – for example, an EpiPen or inhaler. This is always a sensitive topic and you may encounter resistance but it directly impacts your ability to respond to medical emergencies. Use good judgement regarding if and what information you ask for. Needless-to-say, any information provided is to be kept in confidence.

Where appropriate and notably for camps or major trips, ask participants for emergency contact information. It is a good idea to consolidate this information and provide a copy to assistant leaders and any others you deem appropriate.

Non-ACC Members

There is no legal requirement for trip participants to be ACC members, but non-members are not covered by the ACC's insurance should they be found negligent in causing someone personal injury or property damage or loss. It is strongly recommended that all trip participants become members of the ACC, as this protection is one of the benefits of membership.

The [Membership Coordinator](#) or [e-letter Editor](#) can confirm whether or not a prospective participant is a paid-up member of the ACC and the Ottawa Section.

Non-Section Members

As a general rule, individuals who are ACC members but not members of the Ottawa Section are welcome to join ACC Ottawa trips. However, certain camps and trips may be designated as exclusive to the Ottawa Section or priority may be given to Ottawa Section members. If uncertain about which policy to apply, consult the appropriate Activity Coordinator.

Minors

The ACC believes that children benefit from participating in appropriate club activities and has established a comprehensive policy for persons under the age of majority. Any Trip Leader contemplating including children in a club trip should familiarize him/herself with the policy well in advance of the trip and discuss the trip proposal with the applicable Activity Coordinator. It would also be advisable to seek out other Trip Leaders with experience in this area and to be informed by their experience.

Here are highlights of the ACC policy regarding the participation of minors in club events:

- The parents of minors should be encouraged to participate in the proposed activity if at all possible or practical. If minors under the age of 12 years will be participating, it would be appropriate to insist their parent or guardian accompany them for the duration of the activity.
- Proper parent/guardian permission forms must be completed. Parents must be informed of the full nature of the activities proposed and the associated risks. At present, the ACC does not have a specific format for this.
- Relevant medical information should be acquired i.e. allergies and sensitivities, medication, significant physical conditions, etc.
- Consider whether the minor concerned has the experience and physical ability to handle the activities planned. Where possible, it would be helpful if minors could be assessed on easier, shorter Club outings before taking part in major activities.
- Adequate supervision is even more essential with minors than with adults. Consider what would be an appropriate supervision ratio.
- All matters relating to safety must be more conservative when minors are involved.

The full ACC policy regarding participation of minors in club events can be found [here](#). In particular, note provisions regarding the signing of waivers.

Custodial Groups

Additionally, Parks Canada has established mandatory policies and regulations for "Custodial Groups" planning winter backcountry travel in National Parks. These policies and regulations for custodial groups have been adopted by ACC National and apply to ACC Section trips as well. A Parks Canada public information package is available [here](#).

Trip Leaders planning travel in potential avalanche terrain must be familiar with these guidelines as well as the Avalanche Terrain Exposure Scale ([ATES](#)).

Events in the United States

US citizens and US residents who are ACC members are welcome to participate in ACC National and Section events which take place in Canada.

Due to liability insurance constraints, the situation regarding ACC events which take place in the United States is more complex. The following table (verified by ACC National) specifies the ACC liability insurance coverage for ACC members on official club events in the US, depending on citizenship and residency. Members falling into categories which are not covered by ACC liability insurance cannot participate in ACC National or Section events which take place in the US. Please note that, in some cases, these restrictions apply to Canadian citizens or dual Canadian/US citizens, depending on residency.

**Liability Insurance Coverage for ACC Members on
ACC National or Section Trips to the United States**

Citizenship	Residency	Coverage
Canadian	Canada	Covered
Canadian	US	Not covered
US	Canada	Covered
US	US	Not covered
Dual Canadian/US	Canada	Covered
Dual Canadian/US	US	Not covered
Neither Canadian or US	Canada	Covered
Neither Canadian or US	US	Covered

Special Needs Members

Occasionally, ACC members with special needs will enquire about signing up for Section trips. Each case is unique. The experience can be rewarding to all involved. Before making decisions regarding participation, the Trip Leader should discuss the matter with the applicable Activity Co-ordinator at the earliest possible time. It would also be advisable to seek advice from other Trip Leaders with experience in this area and to learn from their experience.

Limited experience has shown:

- It will need to be determined if the nature of the trip is compatible with the member’s special needs or whether reasonable accommodations can be made to trip plans to facilitate participation. The primary consideration is the safety of all concerned.
- Both the participant and Trip Leader need to be realistic about what is achievable.
- It will be necessary to obtain clarity on relevant medical issues in advance.
- Anticipate that routine things, such as gearing up, may proceed much more slowly than normal. It will be appropriate to assign one or more assistant leaders to assist and monitor the special needs participant.

Participation in National-Level Camps

ACC National has established fitness and behaviour standards for participants in mountain adventure camps. Examples of inappropriate and unacceptable behaviour are [defined](#).

LEADING IN A CRISIS

The Role of the Leader

We hope it never happens, but sometimes things go wrong: perhaps conditions turn dangerous or someone is injured. Then the group focus shifts from recreation to safety and survival. The leader's role also changes to a decisive style. When an accident occurs, there is no time for lengthy debate. Prompt, effective action is needed, and it should be directed by someone with training and experience. The leader should stay "hands off" as much as possible, directing others, maintaining an overview, and thinking ahead to the next steps.

The party should be guided by the three rules of rescue in managing a crisis:

- 1- The safety of the rescuers comes first, even before that of the subject.*
- 2- Act promptly, but deliberately and calmly.*
- 3- Use procedures you have learned and practiced; this is no time for experiment.*

It is easy to think that all backcountry mishaps are life-threatening situations and that the outcome depends solely on what the rescuers do. In fact, neither is usually the case. First, most accidents result in cuts and bruises, sprains, sometimes broken bones, but only occasionally anything worse. Second, the outcome is usually determined by factors beyond the rescuers' control. All that can be reasonably expected is that the Trip Leader draws upon training and experience to devise an appropriate plan and then carry it out as safely and effectively as conditions permit.

The best way to avoid trouble is to anticipate it. Leaders should always be thinking ahead, asking: "What if?" In camp, they think of the climb; on the ascent, of the descent; in success, of retreat. They look for early signs of fatigue in participants, mentally record bivouac sites, keep watch on the time, and note any changes in the weather. Everywhere on trips, leaders mentally cross bridges before reaching them. Trying to stay a step ahead, they hope to avoid problems or to catch burgeoning ones before they become crises.

Accidents are unexpected, but you can prepare for them by taking courses, reading, and mentally rehearsing how you would respond in similar circumstances. All Trip Leaders should get wilderness first aid training.

You can benefit from studying the experiences of other alpinists. Many sources describe and analyse mountaineering accidents. An excellent source is Parks Canada [mountain safety site](#).

Emergency Response

ACC Ottawa has adopted a "Standard Emergency Response Protocol" and "Emergency Scene Management Checklist" for responding to accidents. The protocols follow widely-accepted practice in the emergency response field, with adaptations for the circumstances of typical ACC Ottawa trips. The protocols are available in both [English](#) and [French](#). They have been widely distributed to Section members in the form of a reduced-size, plasticized card suitable to keep in the top of one's pack. See the Safety Coordinator for extra copies, as needed. The intention is that every Section member should have a copy in his or her day pack. In the event of an

accident, if your brain is temporarily fried with the rush of adrenaline, take a deep breath, get out your copy of the protocol and methodically follow the steps.

A major focus of the Section's annual 1-day Wilderness First Aid refresher clinic is dedicated to practicing execution of the protocol and related first aid procedures. Trip Leaders should be well-familiar with the protocol and be able to apply it in an emergency.

Patient Assessment and Monitoring ("SOAP Notes") Form

ACC Ottawa has also adapted a version of the [SOAP Notes](#) form widely-used by emergency response personnel for patient assessment and monitoring. This form provides a means of recording applicable information while methodically following the Standard Emergency Response Protocol. Trip Leaders, as well as trip participants, are strongly encouraged to keep copies of this form in their personal first aid kits, along with a pen or pencil. Copies are maintained in the club group first aid kits.

Emergency Contacts

ACC Ottawa has produced a compact list of [Emergency and Non-Emergency Contacts](#) covering the major destinations frequented on Section trips. Trip Leaders are encouraged to keep a copy of this list with their personal first aid kit. Updates should be brought to the attention of the Safety Coordinator. Trips outside these areas may require researching other emergency contacts during trip planning.

Emergency Communications

Trip Leaders should consider two aspects of communications relating to their trip. The nature of the trip will determine what communication assets to consider. There are many alternatives and technology is evolving rapidly.

- 1) external communications with emergency response, rescue and police agencies, and
- 2) internal communications for group co-ordination and self-rescue.

While ubiquitous, cell phones have serious limitations in the backcountry. Coverage is limited to short range, line-of-sight transmission from cell towers in urban areas and along major transportation corridors and is blocked by hilly terrain and dense vegetation. Nevertheless, it may be worth trying cell phones in a backcountry emergency, especially from high elevation locations, as anomalous long range radio propagation is occasionally obtained. Frontcountry trips (climbing, hiking and skiing) will often be within or close to areas with cell phone coverage.

Consider bringing a satellite phone for remote camps. Renting a handheld satphone for the camp duration is a financially viable option. The two public satellite communications networks offering handheld devices are currently operational - Iridium and Globalstar. However, the Globalstar network continues to have performance issues. Other options include Personal Locator Beacons (PLB) and low bandwidth satellite message services (SPOT and similar devices). It is best to determine which satellite network these devices utilize. All of these devices have advantages and disadvantages, capabilities and limitations.

FRS/GMRS radios are excellent for intra-group communications e.g. between lead and second on a rope team, between lead and sweep in a ski touring or hiking party, or between rope

teams at a mountaineering camp. While short range (typically 3-5 km) and line-of-sight, these devices are inexpensive, small, light weight and readily available commercially.

For more information, an exceptionally thorough reference is [Emergency and Radio Communications for Outdoor Guides and Leaders](#) by ACMG guide Cyril Shokoples.

Search and Rescue

Ground search and rescue is usually conducted by police or volunteer provincial/territorial SAR groups. Park wardens handle this task in national parks. Rescues are activated through the RCMP, provincial police, provincial/territorial emergency programs or the park warden service.

Organizing and conducting a rescue takes time and resources. Parties travelling in the backcountry should be well-equipped and prepared to spend an unplanned bivouac overnight tending to an injured team member whilst a search and rescue operation is mounted.

LIABILITY INSURANCE AND WAIVERS

Liability Insurance

The ACC has a comprehensive liability insurance policy similar to the liability insurance most home owners carry. This liability insurance is essential to the ACC's ability to run club trips. Trip Leaders should be familiar with the scope and general coverage of the insurance policy.

As an overview of the liability insurance policy:

- The coverage is in place only when club members are engaged in an official club activity or are acting on behalf of the club.
- An official activity could be any club activity that is part of a Section's or ACC National's published program.
- The maximum coverage is five million dollars per incident (including any legal costs awarded), subject to a \$5,000 deductible.
- Part of ACC membership dues is directed to liability insurance coverage.
- The liability insurance policy is contracted for by ACC National on behalf of the entire club, which includes activities run by National and by Sections.
- The liability insurance protects club officials, Trip Leaders and trip participants from legal claims arising from club activities.

It is to be noted that the liability insurance policy:

- Is not intended to pay any injured party's medical expenses directly.
- Does not apply to personal activities by club members i.e. when not engaged in an official Club activity.

Details on the ACC liability insurance policy can be found [here](#).

Waiver Administration

Trip waivers are an integral component of the club's liability insurance. Trip Leaders are on the front lines of waiver administration. The ACC insurance policy requires trip waivers to be signed by all participants on all club events. If an individual refuses to sign the waiver, the Trip Leader must advise them that he or she will not be able to participate in the activity.

Trip Leaders are required to have participants in all activities sponsored by ACC Ottawa sign the waiver before the activity begins. The importance of this document to the ACC cannot be over-emphasized. The way Trip Leaders conduct themselves in dealing with participants signing the Waiver is of great importance to whether the document would stand up in court later on, should a lawsuit arise from the activity.

Trip Leaders are strongly advised to read the full ACC National policy on [Waiver Administration, Incident Management & Reporting](#).

Electronic copies of the new 2014 waiver form are available in [English](#) and [French](#).

Trip notices in the e-letter and on the web site now routinely remind participants regarding the waiver, with a link to download and read the form prior to the trip. Trip Leaders can further reduce the waiver administration burden on themselves if they repeat this reminder, including the link to the e-waiver, when sending trip planning information to participants. Ask participants to bring their copy of the waiver to the meeting place. As some will forget nevertheless, print a few copies of the waiver and bring these to the meeting place. This dual track approach should lessen time spent sorting out waivers at the start of the trip.

Following the trip, the Trip Leader should pass the signed waivers to the applicable Activity Coordinator as soon as convenient. ACC National requires Sections to retain signed waivers for a period of six years.

INCIDENT MANAGEMENT AND REPORTING

There are two components to dealing with accidents/incidents:

- 1) immediate response in the field, and
- 2) post-event administration and reporting

Immediate Response in the Field

Trip Leaders are responsible for carrying out or delegating whatever actions are necessary to manage the situation in the field until the victim has been turned over to the appropriate rescue, health care or other authorities. The Trip Leader's incident report will deal with events up to that point. For guidance on dealing with accidents/incidents in the field, refer to "[Leading in a Crisis](#)" and the "[Emergency Response Protocol](#)" sections in this manual.

Subsequently, the Trip Leader's involvement turns to post-event administration and follow-up, which are time sensitive activities.

Post-Event Administration and Reporting

While we treat the topic separately here, the ACC National policy on incident management and reporting is covered by the waiver policy document referenced earlier in this manual. Trip Leaders are strongly encouraged to read the complete [policy](#).

A synopsis of the accident/incident reporting process is as follows:

- The Trip Leader must inform the applicable Activity Coordinator and Section Chair as soon as possible. The Section Chair is responsible for informing the ACC National Executive Director.
- A complete written report is to be prepared and submitted to ACC National by the Section Executive. This should include the original, signed waivers of all persons who suffered (or might later claimed to have suffered) personal injury or property damage/ loss as a result of the incident. The report should stick to the facts. In normal circumstances, it is expected that the report will be in the hands of the Executive Director not more than three weeks after the incident.
- Any questions from the media should be referred to the Executive Director.

ACC National has developed two forms for this reporting purpose:

- 1) [Accident/Incident Report Form](#)
- 2) [Field Accident Report Form](#)

What Constitutes a Reportable Incident?

Trip Leaders are strongly advised to read the ACC National guidance on what constitutes a [reportable accident](#). The ACC Ottawa Section Chair can provide further advice on this matter.

TRAVEL IN AVALANCHE TERRAIN

Avalanche Transceiver Policy

ACC National has established the following guidelines regarding avalanche transceivers.

- Participants on all mountaineering, skiing and ice climbing trips, camps and courses of the Alpine Club of Canada in avalanche terrain are required to use a modern avalanche transceiver, as recommended by Avalanche Canada. Recommended avalanche transceivers are digital, multi-antenna transceivers. Analog and single-antenna transceivers are not acceptable.
- ACC members are advised to take note of the manufacturer's recommendations for the expected useful service life of avalanche transceivers.
- While digital, two-antenna transceivers (eg. Tracker DTS, Ortovox X1) are still acceptable, ACC members are encouraged to upgrade to digital, three-antenna models such as the Tracker 2, Ortovox 3+, Barryvox/ Marmot Pulse, Pieps DSP, etc.
- ACC members are also advised that the usefulness of any transceiver depends on the familiarity of the user with the transceiver. Regular practice throughout the season is strongly encouraged.

Winter Travel with Custodial Groups

Refer to Parks Canada and ACC policies on winter travel with "[Custodial Groups](#)".

Avalanche Safety for Mountaineering and Alpine Backcountry Skiing

Specific guidelines relating to avalanche safety issues are provided for mountaineering, alpine backcountry skiing and snowboarding in the companion Trip Leader Guidelines document.

USEFUL REFERENCES

1. "Alpine Skills: Summer", Petzl Foundation and Alpine Club of Canada, 2013.
2. "Mountaineering: The Freedom of the Hills", The Mountaineers, Seattle, 8th Ed., 2010.
3. "Technical Handbook for Professional Mountain Guides", Association of Canadian Mountain Guides (ACMG) and American Mountain Guides Association (AMGA), 1999.
4. "Professional Hiking and Backpacking Guides Handbook", Association of Canadian Mountain Guides (ACMG), 2004.
5. "AMC Guide to Outdoor Leadership", Alex Kosseff, 2nd Ed., Appalachian Mountain Club, 2010.
6. "Playing It Safe", Ed. Murray Toft, Alpine Club of Canada, 1998.

USEFUL LINKS

The following is a compilation of external hyperlinks included in either the Trip Leader Manual or Trip Leader Guidelines.

ACC Ottawa

Emergency Response Protocol (EN)	http://alpineclubottawa.ca/wp-content/uploads/2015/03/Std-Emergency-Protocol.pdf
Emergency Response Protocol (FR)	http://alpineclubottawa.ca/wp-content/uploads/2015/03/Std_Emergency_Protocol-FR.pdf
Patient Assessment and Monitoring (SOAP Notes) Form	http://alpineclubottawa.ca/wp-content/uploads/2015/03/ACC-Soap-Notes-v2.pdf
Emergency and Non-Emergency Contacts	http://alpineclubottawa.ca/wp-content/uploads/2015/03/2014-11-17-Emergency-Contact-Info.pdf
Mountaineering Camps Guidance for Participants	http://alpineclubottawa.ca/wp-content/uploads/2015/03/ACC-Ottawa-Mountaineering-Camps-Guidance-for-Participants.pdf
Sample Safety and Emergency Response Plan	http://alpineclubottawa.ca/wp-content/uploads/2015/03/Sample-Safety-and-Emergency-Plan-ACC-Ottawa-Mountaineering-Camp.docx

ACC National

Waiver Form (English)	http://www.alpineclubofcanada.ca/wp-content/uploads/2014/06/ACCWaiver2014.pdf
Waiver Form (Français)	http://www.alpineclubofcanada.ca/wp-content/uploads/2014/09/ACCWaiverFrench.pdf
ACC Liability Insurance Policy	http://www.alpineclubofcanada.ca/adventures/trip-administration/#liability-insurance
Waiver Administration, Incident Management and Reporting	http://www.alpineclubofcanada.ca/wp-content/uploads/2015/01/WaiverAdminPolicy.pdf
Accident/Incident Reporting Guidelines for ACC Activities	http://www.alpineclubofcanada.ca/wp-content/uploads/2014/06/IncidentReportingPolicy.pdf

Accident/Incident Report Form	www.alpineclubofcanada.ca/incident-report-form
Field Accident Report Form	www.alpineclubofcanada.ca/accident-report-form
ACC Policy on Minors	www.alpineclubofcanada.ca/policy-on-minors
ACC Mountain Adventures Participant Policy	www.alpineclubofcanada.ca/participant-policy
TNF/ACC Leadership Course	www.alpineclubofcanada.ca/adventures/leadership-training

Mountaineering and Avalanche Safety

Parks Canada Policy on Custodial Groups	http://www.pc.gc.ca/eng/pn-np/mtn/securiteemontagne-mountainsafety/gardiens-custodial.aspx
ATES Technical Model	http://alpineclubottawa.ca/wp-content/uploads/2015/04/ATES-Model.pdf
Avalanche Terrain Exposure Scale (ATES)	http://www.pc.gc.ca/eng/pn-np/mtn/securiteemontagne-mountainsafety/avalanche/echelle-ratings.aspx
Avalanche Terrain Maps, National Parks	http://www.pc.gc.ca/eng/pn-np/mtn/securiteemontagne-mountainsafety/avalanche/terrainsav-avterrain.aspx
Public Avalanche Safety Bulletins	http://www.avalanche.ca/cac/bulletins/latest
Avalanche Safety Training (AST)	http://www.avalanche.ca/training#crs
Avalanche Self-Rescue Protocol	http://www.acmg.ca/03public/resources/avicard.asp
Mountain Conditions Reports (MCRs)	http://acmg.ca/mcr/
Tree Wells and Snow Immersion Hazard	http://www.deepsnowsafety.org/index.php/
Parks Canada Mountain Safety	http://www.pc.gc.ca/eng/pn-np/mtn/securiteemontagne-mountainsafety/accidents.aspx
Daily Avalanche Risk Assessment Worksheet	http://alpineclubottawa.ca/wp-content/uploads/2015/03/ACC-Ottawa-Daily-Avalanche-Risk-Assessment-Worksheet-v1.1.pdf

Other Technical Resources

Emergency and Radio Communications for Outdoor Guides and Leaders, Cyril Shokoples	http://www.rescuedynamics.ca/articles/pdfs/EmergCommLeader2.4.pdf
Shortroping 100 – Shortening the Rope, Cyril Shokoples	http://www.rescuedynamics.ca/articles/pdfs/Shortroping100.pdf
Shortroping 201: Advanced Rope Techniques for the Aspiring Excellent Leader, Cyril Shokoples	http://www.rescuedynamics.ca/articles/pdfs/Shortroping201.pdf
Backcountry Skiing Safety in the East, Bill Scott	http://alpineclubottawa.ca/wp-content/uploads/2015/03/BC-Ski-Safety-in-the-East-Jan-07-v1.2.pdf

DEFINITIONS

ERNEST An acronym to remember the important points in building an anchor. The letters have the same meaning as in the acronym **SRENE**. **T** means *timely*; in other words, anchors should be simple and easy to build without giving up any of the other qualities.

SRENE An acronym to remember the important points in building an anchor. See also ERNEST.

- **S** means *strong* and *secure*.
- **R** means *redundant*. Every anchor component should be redundant so that, if one element fails, another will back it up and prevent failure of the anchor as a whole.
- **E** means *equalized*. Each component of the anchor carries an equal amount of the load.
- **NE** means *non-extension*. Anchors should be built so that if one component fails, the remaining components won't be shock loaded. In practice, it is not possible to simultaneously achieve *non-extension* and *equalization*. Therefore, we aim for an anchor that is *minimally-extending* upon failure on any component.

YDS The Yosemite Decimal System is a numerical rating scheme for North American rock climbing and scrambling grades. See the Scrambling Guidelines for more detail.