

## Santa Clara Valley Chapter California Native Plant Society Field Trip Procedures

The purpose of these guidelines is to increase the probability that any Chapter event will be a safe and pleasant experience for both those attending the event and those who lead it.

**Plan the event.** Determine where and when the event will be held. Except in unusual circumstances, it is expected that an event leader will have previously explored the event location under circumstances similar to those likely to be encountered during the event. Develop a brief but complete description of the event and its expected outcomes. Include the event location and duration and include any other information that will help potential participants determine if the event is suitable for their interest and ability levels. Mention any significant or unusual hazards. Describe the event in terms that have significance for the general public. Communicate the event information to the appropriate audience. Arrange for at least one event leader and one assistant leader or sweep. **All events must have one person who functions as the event leader and one who functions as the assistant leader or sweep.**

**Orient participants prior to the start of the activity.** Arrive early at the trailhead. Plan to be there at least 15 minutes prior to the scheduled start time. Greet everyone as they arrive and make them feel welcome. Confirm that they are there to participate in the scheduled activity.

Explain the sign-in list and have everyone sign in. The sign in list should contain a concise description of the event, including any unusual hazards. The event information on the sign-in sheet should be consistent with other information distributed about the event. The list will help manage the participants, will remind the leader and sweep of information that should be shared with the group, and serves as a historical record of the event. Persons not willing to sign in will not be allowed to participate in the event.

Introduce yourselves and the event. The leader(s) and sweep(s) should introduce themselves so participants will know who is in charge. Mention that SCV-CNPS is the sponsoring organization and provide membership brochures to anyone not familiar with the organization. If there are several participants who are not familiar with CNPS, provide a brief description of CNPS with emphasis on the local Chapter. Describe the basic details of the event. Repeat the information on the sign-in sheet regarding distance, elevation change, time, and expand on potential hazards. Be objective and realistic. Emphasize that the group will observe all rules governing the location(s) to be visited. Run through the list of gear that everyone should have. If someone does not appear to be suitably equipped for the event, a situation that could put the individual and the group at risk, the leader or sweep may discourage or restrict that person from participating in the activity. Indicate approximately when and, if possible, where lunch will occur.

Describe how the leader(s) and the sweep(s) will work to keep the group together. No one should be in front of the leader. No one should be behind the sweep. The leader and sweep need to develop a method for communicating with each other in the event that a situation occurs where it is not advisable for one to go to the location of the other. Unless otherwise agreed upon, the leader should stop at all trail junctions, stream crossings, and every 20 minutes until the entire group is together. You may wish to ask participants to help keep track of others.

Remind participants that they are responsible for their own safety and that of the group. If anyone feels that the situation will be or has become unsafe, it is their responsibility to discontinue participation at that time.

Explain that anyone leaving early should notify either the leader or sweep, who should mark the change on the sign-in sheet, including the time that the person(s) departed.

You may wish to wait a few moments for latecomers. Once everyone has signed-in and event orientation has been completed, the event should start to avoid losing the attention of the group. An initial stop close to the trailhead will allow late arrivals to catch up to the group. Make sure that late arrivals complete the sign-in sheet.

**Conduct the event.** As much as possible, stick to the published plan with any modifications announced at the start of the activity. If circumstances require any significant changes from the event as originally announced, communicate the nature and significance of the changes to the entire group and allow them to decide on an individual basis whether to continue. If anyone wishes to stop participation at any time and return to the starting location, make sure that they have the necessary information and appear to be able to return without assistance. Anyone not deemed capable of returning to the starting location without assistance must not be allowed to leave the group unaccompanied. The leader and sweep should periodically monitor the status of event participants. Should participants appear to be experiencing difficulty of any sort, attempt to determine the nature of the problem and, if appropriate, take action to eliminate or reduce the impact of the situation.

The leader(s) and the sweep(s) have the authority to dismiss anyone behaving in a manner that significantly impairs the progress or safety of the group.

Under certain circumstances, it may be necessary or desirable to discontinue the event or to make significant modifications to the planned agenda.

**Conclude the event.** After everyone has reached the ending location and the event has been completed, thank everyone for their participation and attempt to answer any final questions. If you have offered to provide additional information to anyone, make sure that you have adequate contact information for delivery of the requested material. Make sure that everyone on the sign-in sheet has been accounted for. Forward the sign-in sheet to the Field Trip Chair.