

OREGON NORDIC CLUB



OREGON NORDIC CLUB PORTLAND CHAPTER LEADERSHIP HANDBOOK

REVISION HISTORY

Revision	Edited By	Summary of Change
26 Apr 2015	Unknown	Updated with correct info for overnight tour
01 Jun 2017	S. Diamond	Numerous sections in appendix had info which was already on website. Removed this information and instead provided a link to info on website. Updated document format to provide revision control.
09 Sep 2017	S. Digard	Updated Overnight trip section to reflect committee. Moved guidelines to website.

TABLE OF CONTENTS

1	<i>MISSION STATEMENT</i>	3
2	<i>HANDBOOK PURPOSE</i>	3
3	<i>LEADERSHIP BASICS</i>	3
4	<i>TOUR TYPES</i>	4
5	<i>TEN STEPS OF LEADERSHIP</i>	4
6	<i>SAFETY</i>	6
7	<i>TABS</i>	7

1 MISSION STATEMENT

The mission of the Chapter is to encourage, foster, and promote a greater interest in and understanding of the values of cross-country skiing, and to provide a means whereby its members may participate in a variety of social and recreational activities.

2 HANDBOOK PURPOSE

The purpose of this Handbook is to provide tour leaders with the tools they need to lead fun, creative, and safe outdoor recreation with the Portland Chapter of the Oregon Nordic Club (the “Chapter” or “ONCPDX”).

3 LEADERSHIP BASICS

Who Can Be a Leader?

The Chapter encourages you to become a day or overnight trip leader if you: (i) are a Chapter member; (ii) like to recreate with other people; (iii) are confident about your ability to ski under a variety of conditions at the place you will be leading a tour; and (iv) can communicate effectively with tour participants under a variety of circumstances.

Responsibilities

Tour leaders are responsible for: (i) picking the tour location; (ii) planning the tour; (iii) preparing for the tour and, when applicable, ensuring that fees are collected and costs are paid; (iv) leading a fun and safe tour; and (v) completing required reports. While tour leaders should generally observe whether tour participants are properly equipped, tour participants remain fully responsible for having the correct clothing, equipment and food for the tour.

Benefits

There are numerous benefits to being a tour leader, with the most important benefit being the knowledge that your efforts have resulted in someone else having a safe and fun cross-country ski experience. In addition to this gratifying knowledge, tour leaders: (i) participate at reduced costs, including overnight lodging costs; (ii) are reimbursed for a variety of costs including gas and snow park passes; (iii) are eligible for training cost subsidies (e.g. first aid training); and (iv) meet new and interesting people, some becoming life-long friends.

Volunteering

It is easy to volunteer to be a tour leader, simply contact the Day Tour or Overnight Trip coordinator to discuss the types of tours (see below) that you are interested in leading. Contact information is provided in the Chapter’s monthly newsletter as well as on the Chapter’s website (onc-pdx.org). It is usually helpful to check the tour calendar before contacting one of the coordinators. If you are new to tour leading, the Chapter encourages you to shadow other tour leaders on a tour that is similar to the tour that you intend to lead. You will find Chapter tour leaders friendly and happy to share what knowledge with you.

4 TOUR TYPES

Tours range from one-day tours close to Portland to over-night trips lasting several days at significant distances from Portland, including ski tours in Canada and Europe. Guidance provided in this Handbook typically applies to both types of tours, with the exception that the sign-up process for day tours is different than signing up for an overnight trip.

While the Chapter focuses principally on cross-country skiing, it does sponsor other types of tours, including snowshoeing, biking and hiking tours. Tour planning ranges from simple to complex. Overnight Trips can sometimes involve a complicated set of tasks, especially if they are in another state or country.

See TABS for a listing of trip ratings for difficulty.

5 TEN STEPS OF LEADERSHIP

While the Chapter tries to make tour leading a relatively easy experience with standard procedures and forms, every trip is unique. So, the use of common sense and good judgment cannot be overemphasized. With this in mind, tour leading can be generally broken down into the following steps. More detailed information and advice for Day Tours and Overnight Trips provided in the tabbed section to this Handbook.

(1) Select the Tour Location

Select a location or trail that you know or have sufficiently researched. When researching an area or trail, contact local experts (e.g. Forest Service recreation specialists) to get other information about the trail or area, especially information about likely snow circumstances in the area at the time you are planning to lead your tour. Tour selection and planning resources are listed in TABS.

(2) Coordinate

Avoid frustrations by contacting the Day Tour or Overnight Trip committee to generally discuss the trip you would like to lead. Tour coordinators will know whether the planned trip is a good fit with the existing tour calendar and may also have advice that will be useful when making more detailed plans for the tour.

(3) Research

Necessary Special Arrangements and Likely Costs. Special arrangements include, but are not limited to, transportation, lodging, food and snow park passes. It is important for potential tour participants to fully understand the specific details of the planned tour, including likely costs and special equipment needs, if any.

(4) Make Specific Plans

Once the basic research has been completed specific plans are required, including: the specific tour dates; tour size limits; actual lodging transportation and food requirements; and the per person cost of the tour. The Overnight trip workbook is provided on the ONC-PDX (see [TABS](#)).

(5) Get Approval and Advertise

Specific plans will be reviewed by the appropriate committee and/or the Chapter Board. Once the tour is approved, the tour can be advertised, typically in the Chapter's monthly newsletter, website or Meetup site. Chapter resources will be made available to pre-pay required costs, if any (e.g. overnight lodging reservations, transportation deposits, etc.).

(6) Signing Up

Tour leaders are the point of contact for all reservations. If more people sign up than there is space, the tour leader also maintains a waiting list. Overnight Trip reservations are made through the website initially and may be made through the Trip Application form (see TABS) after the initial sign-up at the fall trip meeting. Current Overnight Trip policies are listed on the ONC-PDX website (see [TABS](#)). Required payments are collected online or mailed to the tour leader, who forwards all payments onto the Chapter treasurer. Day Tours reservations are less formal, typically by phone or email. But, Day Tour participants are required to sign the Day Tour registration sheet maintained by the tour leader (see TABS). Current Day Tour policies are listed on the website (see TABS).

Both the Day Tour and Overnight Trip sign up forms include a standard indemnity language, indemnifying the Chapter and tour leader from injury claims made by tour participants. Tour leaders must obtain an indemnification from all tour participants in one form or the other.

(7) Make Preliminary Arrangements

Among other things, tour leaders: (i) facilitate car pooling arrangements; (ii) make final arrangements for lodging, including room assignments, if applicable; and provide trip participants with general information which will help to ensure a successful tour. Tour leaders should provide beginner and novice skiers with advice on clothing and equipment that will be necessary for the tour. A clothing and equipment checklist is attached as TABS).

(8) Lead the Tour

Each tour is different, with some requiring very little in the way of leadership skills, while other required highly skilled leaders. Regardless of the skill levels required, the outcome goal is the same, a safe and enjoyable tour. Tips for achieving this outcome goal are provided as [TAB - LEADERSHIP TIPS AND GUIDELINES](#)

(9) Encourage Proper Trail Etiquette

Trip leaders should encourage tour participants to use proper trail etiquette at all times. A Chapter guide to proper trail etiquette is listed in [TABS](#) for this purpose. Additionally, given the increasing number of people who are recreating with their pets, trip leaders should be familiar with the Chapter's tour guidelines that apply to dogs (see [TABS](#)).

(10) Follow Through

One of the most important jobs of the tour leader is post-tour follow through, with key activities including: (i) reporting final tour details (participants, costs, expenses, etc.) to the tour coordinators and treasurer; (ii) evaluating the trip outcome and recommending ways to make it better in the future; and getting reimbursed for reasonable expenses. A link to reporting and evaluation form, reimbursement form and feedback form is listed in TABS

6 SAFETY

The most important goal of all tours is a safe outcome. Key to this outcome is a tour leader with appropriate skills, experience and conditioning for the tour. While wilderness first aid skills are helpful, they are not essential. But, the ongoing use of common sense and good judgment is essential to a safe tour. Additionally, tour leaders should take the following steps to ensure a safe outcome:

- Limit the size of the tour to a manageable size.
- Ensure that all participants are properly equipped before starting.
- Encourage your group to remain together and have an understanding of what should be done if participants become separated from one another.
- Watch for signs of frustration, fatigue and hypothermia.
- Carefully watch tour participants at danger areas, including creek crossings, avalanche areas and difficult traverses.
- Team more experienced skiers up with skiers that appear to be having problems.
- Watch the time, being careful not to go farther than intended before turning around.
- Adapt to changing circumstance, e.g. give up on a destination goal if the route to the destination is apparently too difficult for some of the participants.

If any sort of safety incident occurs on trip, leaders are required to fill out the Incident Report Form

7 TABS

The club website is now used as the primary repository for information and the majority of information has been moved to the website. This section provides links to that information. As changes occur to the website, some of the links below may be invalid. If so, please search through the website menu structure to find the appropriate link.

RATING AND LOCATIONS

[TRIP RATING](#) (Resources ► Trip Ratings)

Difficulty rating system for skiing, hiking and cycling tours

[TRAILS AND MAPS](#) (Resources ► Trails and Maps)

Guidebooks, maps and Day Tour write-ups

OVERNIGHT TRIPS

ONC [OVERNIGHT TRIP WORKBOOK](#) (Members Only ► Forms)

An Excel workbook to aid planning and expense recording for Portland Chapter overnight trips.

[OVERNIGHT TRIP APPLICATION](#) (Members Only ► Forms)

Form for trip signup.

[OVERNIGHT TRIP POLICIES](#) (Resources ► Trip Policies ► Overnight Trip Policies)

[OVERNIGHT TRIP EVALUATION FORM](#) (Activities and Events ► Overnight Trips)

OVERNIGHT TRIP PROCEDURES (Members Only ► Resources for Leaders)

DAY TOURS

[ONC-PDX ACTIVITY SIGN-UP FORM](#) (Members Only ► Forms)

Waiver form for participant registration on all Portland chapter activities including day tours, shelter work, and trails tending

[DAY TOUR POLICIES](#) (Resources ► Trip Policies ► Day Tour Policies)

[DAY TOUR FEEDBACK FORM](#) (Activities and Events ► Day Tours)

[DAY TOUR LEADER INCENTIVE REIMBURSEMENT FORM](#) (Members Only ► Forms)

Form for sno-park and training reimbursement

MISCELLANEOUS POLICIES

[DOG POLICIES](#) (Resources ► Trip Policies ► Dog Policies)

[CARPOOLING POLICIES](#) (Resources ► Trip Policies ► Overnight Trip Policies)

EQUIPMENT ON TOUR

[TOUR ESSENTIALS](#) (Resources ► Tour Essentials)

Ten essentials for Nordic skiing

[WHAT TO WEAR](#) (Resources ► What to Wear)

Clothing guidance

[SKI GEAR](#) (Resources ► Ski Gear)

Overview of ski types and suitability for various conditions

[SKI GEAR](#) (Resources ► Ski Gear)

Overview of ski types and suitability for various conditions

SAFETY

[INCIDENT REPORT FORM](#) (Members Only ► Forms)

MISCELANEOUS

[TRAIL ETIQUETTE](#) (Resources ► Trail Etiquette)

General advice on proper trail etiquette for Nordic skiing

TAB - LEADERSHIP TIPS AND GUIDELINES

GENERAL

- Take pride in your leadership role by talking to new members about the club, creating a friendly atmosphere, making the most out of opportunities to “train” participants on proper trail etiquette, and making prompt and direct decisions.
- Carry the equipment essentials listed in this guide. Bring extra food and a full-length thermal pad in case of emergencies.
- Although we want everyone to have fun, safety is your #1 priority.
- Be prepared with an alternative plan should trail, adverse weather conditions, or dangerous road conditions force a change.
- Always show up at the meeting place or find a replacement leader, be flexible, and do not cancel!

DAY TOURS

BEFORE

- Arrive at the meeting place at least 10 minutes, early.
- Greet participants and have them sign the attendance/waiver form.
- Refuse participation to anyone who is poorly prepared, either with clothing or skill level. These people could affect the safety of the group. Do this in private and advise the person what they need for next time or where to find more info about necessary items.
- Explain the trail, tour rating and why, anticipated pace, schedule for the day, expected conditions, re-group locations, and bail-out options. Explain the Tour Equipment Essentials. If someone does not have one or more of the essentials, you can either ask them to leave or buddy up with someone who has enough essentials to cover them. Buddying-up means they stay together all day.
- If you are planning on a brisk pace and few stops, ask for a show of hands of people who would like a more leisurely pace, in the event that they want to form a separate group. If so, make sure they have a designated leader. If no one is willing to take on the leadership role, recommend that they try a less challenging option for the day, such as Teacup Lake. Separate groups work well on out and back tours.
- Facilitate introductions (perhaps ask for something memorable about each person, like the name of their first pet, or place of birth). Make a note of the number of participants.
- Ask participants to organize carpools-- ask who can drive--and make sure personal equipment goes into the same car as the owner. Remind drivers they need a Sno Park permit.
- If separate group forms, explain that they should start and leave at the same time and make sure everyone is accounted for before departing.

DURING

- Carry the attendance/waiver form or list of participants with you
- Ask for a volunteer to serve as the sweep, either for the entire day or part of it
- Never leave anyone behind. Take head counts at each re-group locations.

- Notify the group when you reach bail-out locations. If anyone wants to leave, they must have a buddy. If they are in a separate car, and then ask them to leave you a note on your vehicle when they leave so that you know they arrived at the trail head safely.
- Watch each participant at danger areas, such as creek crossings or terrible traverses, to make sure they crossed successfully.
- Be a leader at all times. Maintain good communication with your group, check-in with individuals from time to time, and make resolute decisions.
- Do not leave the trailhead until all participants have returned.
- Re-group at the end of the day and ask for people to share fun experiences or to provide feedback.

AFTER

- Scan or mail the sign-up sheet to the ONC P.O. Box listed on the form.
- Pat yourself on the back for sharing a good trail, providing a fun experience, and bringing your group back safely.

OVERNIGHT TRIPS Contact at: ONCPDX.ONTRIP@GMAIL.COM**ESSENTIAL INFORMATION**

- You must complete the Activity Planning Sheet and forward it to the Overnight Trip Committee for approval before the trip will be posted to the calendar or any checks will be issued by ONC. The Overnight Trip Committee must approve any expenses not listed in the original Planning Sheet.
- You are responsible for resubmitting the ONC Overnight Trip Workbook with all actual income and expenses to the Overnight Trip Committee within 14 days of completion of your trip.
- You are responsible for collecting all funds from participants before the trip, and forwarding them to the ONC Treasurer. Funds are to be mailed within one week of receiving checks from participants.
- You are not authorized to offer refunds unless the trip is filled and a replacement is found. If a replacement is found, refunds are \$10.00 less than the amount paid. There is a field on the Participant tab of the ONC Overnight Trip Workbook for any refunds.
- It is important to understand that when figuring out costs, the 10% stipulated in the Activity Planning Sheet will be used for operating costs for ONC, and is not a discretionary amount for your trip.
- If you ask for reimbursement of an item not detailed in your Activity Planning Sheet, you will not be reimbursed for that amount.
- Accommodations often have cleaning fees and taxes. Be sure to investigate any and all possible charges before submitting your Activity Planning Sheet.
- It is wise to add a small miscellaneous amount to cover unforeseen costs (tip, food items, extra roll away bed, etc.).

START TO FINISH TIPS AND GUIDELINES**THE PLANNING**

- See Past Trips list for ideas on leading a trip.

- Check with Overnight Trip Committee to discuss ideas and open dates on ONC calendar.
- Contact tour site to determine dates and availability. Ask about group discounts and high/low season charges and discount on group rates. What is the minimum and maximum number of attendees? Get a quote, in writing with deposit requirements: No-Penalty refund date, prorated dates whenever possible, and no refund date.
- When renting a house, it is generally easier to choose the option of paying to have a cleaning service take care of the cleaning rather than to have the attendees worry about, washing, sheets and vacuuming. Note that the planning spreadsheet prompts you for this information.
- Use the Overnight Activity Planning Sheet to determine costs.
- Create an article for the newsletter and e-mail it to the Overnight Trip Committee. Please submit articles as an attachment in Word following the basic format used in the newsletter. Once the article has been approved, it will be forwarded to the Newsletter Editor. DO NOT submit your article directly to the Newsletter Editor. It will not be entered into the newsletter unless it is submitted and approved by the Overnight Trip Committee. The cut-off date of submission for a newsletter article is the 13th of the month. It is recommended you submit the newsletter article with the Activity Planning Sheet

THE TRIP

- Advise the Overnight Trip Committee if the departure date is approaching and the trip is not full.
- Contact your participants prior to the trip to arrange for carpooling, potlucks, equipment info, etc. You may choose to have a trip participant meeting before the trip to allow participants to make arrangements, get to know their fellow travelers, arrange carpooling, etc. The leader should send participants an email including a roster listing attendees, food assignments, and whether they are driving or looking for a ride.
- Once at your location, assist members with their room assignments and locations. Instruct them of any time constraints for the following day. Decide upon times for breakfast, departures, and dinner.
- As a tour leader, it is your responsibility to ski with the group, and to guide them when necessary.
- Remember to have a good time yourself!
- Make sure everyone is aware of the departure/check-out time.
- Be sure to check what is required of you before you depart. Some facilities require that you pull sheets from beds, put garbage out, and other similar type items. Leave the facility in a decent, clean order. Lock doors, close windows, etc. if needed.

THE FOLLOW THROUGH

- Resubmit the ONC Overnight Trip Workbook to the Overnight Trip email address within 14 days after the trip is complete.
- Attach receipts if any additional funds are due, and submit a Check Request form to the ONC treasurer.

- You may submit a tour follow-up newsletter article along with a picture to the Newsletter Editor. Please note that submission is dependent on space.
- You may choose to have a gathering after the trip to share and/or exchange photos. Many times this is a potluck at one of the attendee's home. Email pictures to the Newsletter Editor with a brief synopsis of the trip.