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# **Good Practice Guide**

**for**

# **50+ Walking Groups**

**Written by: Dave Horrocks  
Adventure Scotland Consultancy**

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# GRAMPIAN 50+ NETWORK

## A GOOD PRACTICE GUIDE FOR WALKING GROUPS

### Introduction

I know what you're thinking:- ***“How can simply going for a walk get so complicated that we need a guide to tell us how to do it?”***

If you and a few friends decide to go for a walk together then it really is that simple – a group of adults taking responsibility for themselves and answerable to no-one else. But when you constitute yourselves into a more formal group, then you do, whether you like it or not, begin to take on levels of responsibility (known as *a duty of care*) for others in that group. It's at this point that things start to get more complicated and it's in this context that I hope you will find this guide helpful.

The guide aims to steer you through some of the issues you should consider when planning, organising and managing walking activities for groups whilst seeking to keep the whole process as uncomplicated as possible.

The guide is in 3 sections:-

1. **PLANNING** – a good and thorough plan is much more likely to result in a smooth and successful outcome.
2. **DOING** – looks at the organisation and management of walking groups
3. **REVIEWING** – identifies how reviewing can pinpoint lessons learned and feed them back into the planning cycle

# 1. PLANNING

**The Grand Plan:** How is your group set up and what does it look like?

- Independent
- Council
- Other affiliation(eg Ramblers' Association)

The advice and guidance in this booklet is aimed mainly at the **INDEPENDENT** club or group. Those groups which operate under the wing of the local authority or are affiliated to a larger agency will need to comply with the requirements of those bodies. They should, in addition, adhere to the best practice outlined here.

## The Planning Framework

When membership of an informal group exceeds around 10 people, then you rapidly reach the stage where a smaller group needs to do the planning on behalf of the wider membership. This gets us into the realms of committees, constitutions and accountability and suddenly the informal group of friends has become, by necessity, a formally constituted group. For those who become involved in planning activities on behalf of the wider membership, it would be best to operate within an agreed framework. Before the detailed planning starts, some key issues will need to be resolved in order to establish a **planning framework**.

These might include:-

1. What is the group's 'reason for being' ?
2. How many active members does it have and how many can it take ?
3. What are their needs/expectations and do they match with '1' above ?
4. Will the programme involve other activities in addition to walking ?
5. Will activities have an appointed leader ?
6. What will be the maximum number of participants on each activity ?

7. Do you have enough people willing and able to take on a leadership role ?
8. What will be the ratio of leaders to participants ?
9. Do you need to have civil liability insurance in place ?

## **Duty of Care**

Even when an informal group of friends takes a walk together, a 'duty of care' exists. In this case, the duty is no more onerous than the moral duty that we all share towards our fellow man. In other words, if we do not accept any responsibility for the health and welfare of our companions, we cannot be held accountable for them or for the decisions they take.

If, however we take on a '**Leadership Role**' then, by doing so, we accept a degree of **responsibility** for the health and welfare of those whom we lead and our duty of care towards them becomes more clearly defined. The duty of care is increased where the leader is an experienced practitioner leading people who are less able to make value judgements for themselves, due perhaps to their inexperience, young age or mental disability.

## **Civil Liability Insurance**

If a leader fails in their duty of care as a result of their negligence then it is possible that he/she may be sued by an injured party. To protect against this eventuality, it is strongly recommended that appointed leaders have **civil liability insurance**. Groups which are affiliated to the Ramblers' Association will have this cover in place as part of their membership and Council groups will be covered by the Council's insurers. Independent groups should seriously consider making arrangements to have cover in place.

## **Planning an Event or Programme of Events**

Once the framework of how the group will operate is established, the committee will want to get on with organising activities. Many of the issues involved in the planning of events will be informed by the planning framework.

## **Managing Expectations**

As long as all the members understand that the group they have joined was established to provide a regular programme of local walks which enables people to engage in gentle, healthy exercise and regular social contact, then they should not be disappointed at the lack of mountain expeditions on the programme. Similarly, if the stated purpose of the group is to develop personal fitness and stamina through power walking then the members should not expect much gentle ambling. Many groups, for the best of reasons, try to provide 'something for everyone' and this can also be done successfully, provided that the members understand that they will need to exclude themselves from those activities which don't fit their needs.

## **Numbers**

The issue of size of membership is inexorably linked to the issue of optimum party size. This is especially the case if the group is trying to provide something for everyone.

## **Optimum Party Size**

The issue of optimum party size and the ratio of leaders to participants is much discussed and has sometimes been a thorny subject. Factors which need to be considered are ***Safety and Environmental impact.***

## **Safety**

If leaders are to lead then they must be able to do this effectively. It is generally acknowledged that groups of more than 15 participants are difficult to manage in the outdoors. Leader to participant ratios of 1:10 should be regarded as an appropriate maximum. This implies that a

group of 15 would require at least one leader supported by another competent assistant.

As terrain and conditions become more demanding the ratios should be further reduced.

## **Environmental Impact**

There can be little doubt that bigger groups are likely to have a greater impact on the environment than smaller ones. Also some areas are more environmentally robust than others and it would be good practice to restrict larger groups to environmentally robust areas.

Part of the negative effect of larger groups can be the impact they have on other countryside users. The Cairngorms National Park Authority has just published some guidelines on 'Organised Events' within the park. These suggest that groups in excess of 25 participants should be considered as an 'organised event'. The inference within this would be that the rights granted to us under the Outdoor Access Code do not necessarily apply for groups of this size.

## **Large Groups**

Where operational requirements make larger groups a necessity, then best practice would be to split the whole into a number of smaller, separately managed units.

## **Size of Membership**

It is sometimes the case that groups become victims of their own success, especially those who seek to cater for a range of tastes and fitness levels. The imperative to provide ALL members with more than a very occasional outing can create pressure to establish uncomfortably large groups. This can cause the tail to wag the dog. It is important firstly to establish what maximum party sizes will be and then restrict membership of the group to a level which the available resources can support.

## **Communication**

Communication is of course a vital ingredient in the planning process and is likely to need to take place with:

- The membership
- A managing agency or affiliated body
- Land managers
- Service providers

## **The Membership**

We sometimes have a tendency to forget that 'communication' is a two-sided process which involves LISTENING as well as TELLING. This is perhaps because, communicating with a group of people who hold widely varying views and opinions can be difficult and frustrating. It is simply not possible to please all of the people all of the time. However, if people feel genuinely consulted and their views have been acknowledged, they will generally accept a reasoned argument as to why their own wishes have not been fully met on occasion.

## **Managing bodies**

For groups that continue to operate under the umbrella of their Council, it will be a requirement, as part of the Council's established safety management arrangements, to inform them in advance of plans via the designated link officer. Required procedures will vary but information needed is likely to include:-

- Dates
- Routes
- Numbers of participants
- Names of designated leaders and their qualifications if appropriate
- Estimated return time
- Emergency contact arrangements

## **Access**

Since the Scottish Government's Land Access Legislation of 2003 and the publication of the Scottish Outdoor Access Code (SOAC), we now enjoy virtually unfettered rights of access to our countryside. Of course with these **rights** come **responsibilities** and it is essential that all those accessing the countryside familiarise themselves with the SOAC ([www.outdooraccess-scotland.com](http://www.outdooraccess-scotland.com))

Regardless of our rights, it is good practice to communicate with land managers regarding your intention to bring organised groups on to their ground. This communication should be in the spirit of **informing** rather than **asking** permission but should also involve **listening** to any justifiable requests for minor changes of plan or route for good reason.

We should not be blind to the fact that prior to 2003, some land managers were traditionally supportive and amenable to having the public on their land whilst others were notably unhelpful and sometimes obstructive. It is tempting to continue to return to those areas that were traditionally welcoming whilst avoiding those which were not. This focuses the burden of recreational land use onto the 'good guys' whilst the traditionally unwelcoming land managers continue to escape intrusion. My advice would be to look for ways of spreading the pressure on our countryside as widely as possible.

## **Service providers**

Transport providers will need clear information on pick-up and drop off times and places.

## 2. DOING

### Guidance for Leaders and Participants

Even when the main programme planning has been done there is likely to be further **Planning and Preparation** in the few days prior to each event. This, and any immediate follow-up, is best thought of as integral to the process of the whole event. So the various stages of completing a walk or other activity can be expressed by the mnemonic, “**FILE**”.

**F**amiliarise

**I**nform

**L**ead

**E**valuate

### **FAMILIARISE**

Wherever possible, leaders should be familiar with the route and the terrain over which they will be leading others. This familiarity is perhaps best derived from long experience of the route in a variety of conditions. The next best option would be to recce the route prior to the event. It is a good idea to make a brief set of notes that will help you to remember particular points of interest and identify potential problem areas. These may be sections of hazardous terrain, wet or boggy sections, difficult fences/stiles or sections that present any navigation issues or opportunities for losing people through wrong turns.

It is often best to use a pro-forma for recce notes and an example is included as Appendix 1. Your notes then become:-

- a useful aide - memoire for your own reference on the walk.
- a check list for briefing the participants about the route prior to setting out.
- a valuable source of reference for future occasions and other leaders.

## INFORM

### 1. Informing the Base Contact

It is good practice to ensure that details of the route plan are left with a responsible person (the **Base Contact**) and that you agree with them a **late back procedure**. This implies that the route plan should always include a return time or **expected time of arrival** (ETA). This would be especially important when operating in more remote areas where raising the alarm may be difficult and involve considerable travel time to reach a telephone.

A suggested late back procedure would be:-

<b>Group Overdue by:</b>	<b>STATUS</b>	<b>ACTIONS &amp; RESPONSE</b>
1hr+	Heightened awareness	1. General awareness raised – looking out for safe return. 2. Re-assure any concerned relatives. 3. Telephone to last known point if possible.
2 hrs +	Low key search	1. Initiate a low key search of general area where group is expected to be. Include expected location of vehicle. 2. Use local people/knowledge where possible. Has the group been seen?
4 hrs +	Full scale response	Notify emergency services and initiate full scale search.

**It is vital that the safe return of the group is reported to the Base Contact as soon as possible.**

## Travel Time

Where there is significant travelling time (more than 30mins) between the base and the end point of the activity, then the **ETA** should be based on returning to the vehicle and not on returning to base. This will prevent unnecessary time loss in initiating an appropriate response where a problem does exist. If there has been a simple delayed return, the leader should check in with the base contact as soon as possible on returning to the vehicle. A timely phone call to base should forestall an unnecessarily vigorous response to a delayed return to base.

## 2. Informing the Participants

One of the key roles of the leader will be to inform participants properly of what to expect. Part of this may be done in advance in the form of **Joining Instructions**. These are likely to focus on:-

- when and from where the transport leaves from
- what to bring including food & drink, clothing and equipment.
- the nature of the route (how taxing or easy it is)
- estimated return time

More information will need to be given to participants in the form of a **Briefing** prior to setting out. At this point the leader will want to:-

- describe the route, its length, features and any particular points of interest or hazards to be expected. (the recce notes form a good check list for this).
- describe expected weather and conditions.
- establish and agree the ground rules in order that appropriate group control is maintained.

## 3. Informing the Leader

It is important for **participants** to recognise that they **also have responsibilities** when they operate as part of a group. One of these responsibilities would be to **inform** the leader(s) in advance of any known physical or medical issues which have the potential to cause difficulties for the leader and the rest of the group.

## LEAD

There is no place here to go into the qualities which make good leaders. There is only an attempt to identify:-

- the main **roles and responsibilities** that the appointed leader has
- the responsibilities of participants who agree to be led.
- good practice in the management of groups

However there is room to give a couple of general points about the leadership role. Taking on the leadership of a group carries significant responsibility, especially if the participants being led are unable to make sound and reliable judgements for themselves due to inexperience, youth or disability. It is important to understand that leading a group will be an entirely different experience to being led. Your own requirements will be subjugated in favour of the group's needs. Your route choice must be made with your primary focus on the group's capabilities rather than your own ambitions. Your judgements and decisions will be made with the welfare of the group in mind, even if they cause you a degree of discomfort, inconvenience or frustration. ***So why would anybody choose to lead?*** The rewards are great. There is enormous satisfaction in facilitating a memorable day for people, in bringing a group of tired and happy people back safely in the knowledge that you've done the very best you can for them ***and that they really appreciate it!!***

## Roles and Responsibilities of the leader

### A leader should:-

- be sufficiently familiar with the route to lead it safely.
- obtain a weather forecast prior to setting out.
- know the group and its capabilities.
- be prepared to modify plans or even cancel altogether if circumstances conspire to warrant it.
- brief participants on what to expect.
- establish and agree a set of ground rules.
- satisfy yourself that what you are doing is environmentally sound and responsible.
- maintain appropriate control of the group and be able to account for the whereabouts of all members all of the time.
- establish an appropriate pace/travel speed (the group's golden mean).
- encourage mutual responsibility (buddy systems etc).
- have fall-back and emergency plans based on a series of "**what ifs**".
- monitor the condition and demeanour of all group members to spot deterioration early.
- be prepared to make judgements and timely decisions to shorten the route or curtail activity if needs be.
- account for everyone's safe return and check in with base contact.
- review the event.

### Responsibilities of Participants

If you have read the previous section you will realise that taking on a leadership role is no small task and, if done voluntarily, requires a degree of self sacrifice. It is important to realise that participants also have responsibilities. If you have opted to join and operate within a walking group or similar you have given up the right to be a free ranging individual, doing as you please at the pace that you please.

***It really is simple – if you want to do that – don't join the group!!***

## **A Participant should:-**

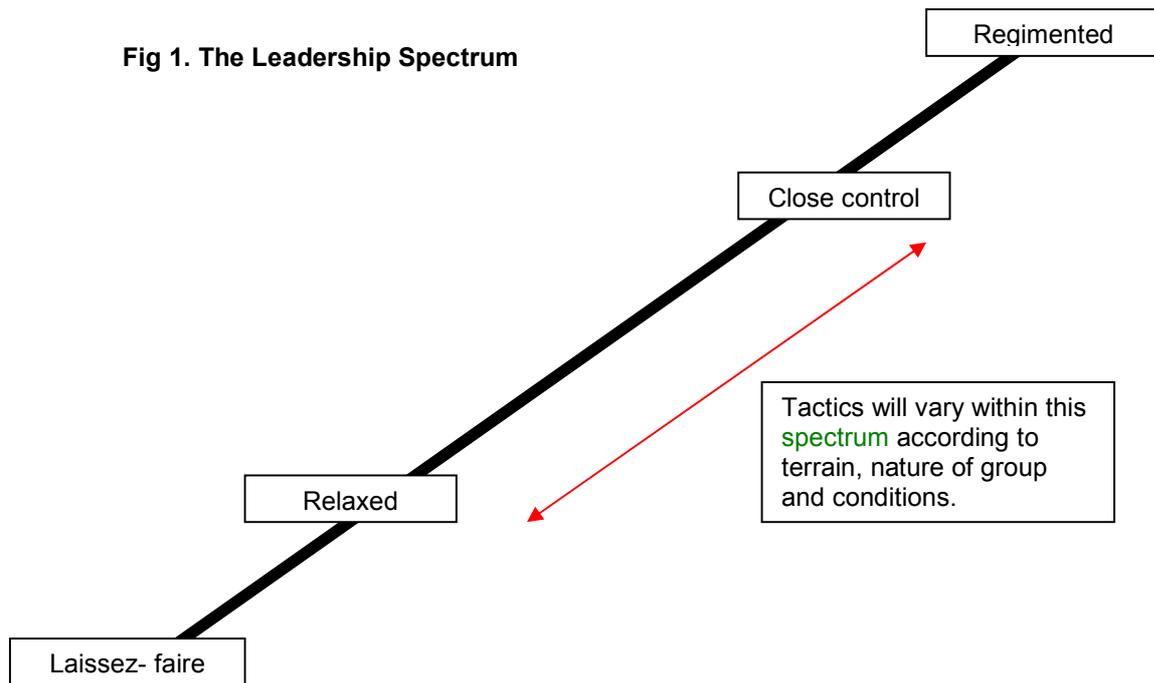
- inform the leader(s) of any physical or medical issues which may affect ability or performance.
- take note of prior instructions and ensure that you are properly clothed and equipped.
- monitor other group members and transmit any concerns to the leader.
- by all means contribute to discussion and provide opinion, but recognise that the leader has the responsibility of making a final decision and respect that decision once made.
- respect the group management ground rules by not charging ahead if the overall pace feels too slow for your taste.
- do not take unilateral decisions that will make it difficult for the leader to account for your whereabouts.
- respect the environment and behave responsibly.
- provide support for other group members who may be finding things more difficult than you.

## **Group Management**

In order to be managed effectively, the group has to be manageable. We looked earlier at optimum group sizes and ratios. What makes a group a manageable size will depend on a number of factors including terrain, ability and experience of the group, weather, season etc etc. The crucial issue remains that the leader needs to be able to account for **all group members** and head counts beyond 10 or 12 can be unreliable

Given that we have a group of appropriate size there is a spectrum of tactics which the leader could adopt for group control. (Fig 1)

Fig 1. The Leadership Spectrum



At one end of the spectrum is a free-for-all with no control at all. At the other is a military style route march in close formation. Clearly neither of these extremes has any place in organised recreational groups. There is, however, a somewhat narrower band in the middle ground where the tactics adopted by the experienced leader will vary according to the sort of factors identified above. There will be times, for example, on easy open ground where a group could be allowed to spread out in relaxed fashion, provided it can be brought back into closer control when required. Conversely, there will be occasions on difficult or hazardous terrain or in poor visibility, where close control of a group is required. The trick is to apply good judgement to ascertain which tactic is the most appropriate and when.

Within the above is the issue of where, within the group, the leader should place him/herself. The temptation is always to lead from the front and this can be very effective. However, it is also possible to lead effectively from within the group provided there are well briefed assistants to manage pace. From the middle of the group, the leader is better placed to monitor the condition of group members and to provide support to any who may be finding it difficult.

It is also important to appoint a back marker to encourage and retain the slower group members. Regular rest stops are important, ensuring that the slower members of the group get adequate time to rest despite the fact that the faster set is likely to be 'champing' at the bit. It is important that faster members understand that a group can only move at the speed of its slowest members. Excess energy is better invested in supporting and encouraging slower members so that morale is maintained.

### **Walking on Public Roads**

When walking on narrow country roads without footpaths, it has long been believed that walkers should stay on the right hand side of the road facing on-coming traffic. This remains the best advice for individuals and small groups of two or three walkers. However, for larger groups, the advice is the **opposite**. Because a larger group presents a significant obstacle for motorised traffic, it needs to be regarded in the same way as a slow moving vehicle and so should remain on the **left hand side** of the road. It would be good practice to ensure that at least the back marker and a few designated 'outriders' wear high vis reflective vests when walking on public roads.

**EVALUATE** This is an important part of the process and is dealt with in the next section.

### 3. REVIEWING

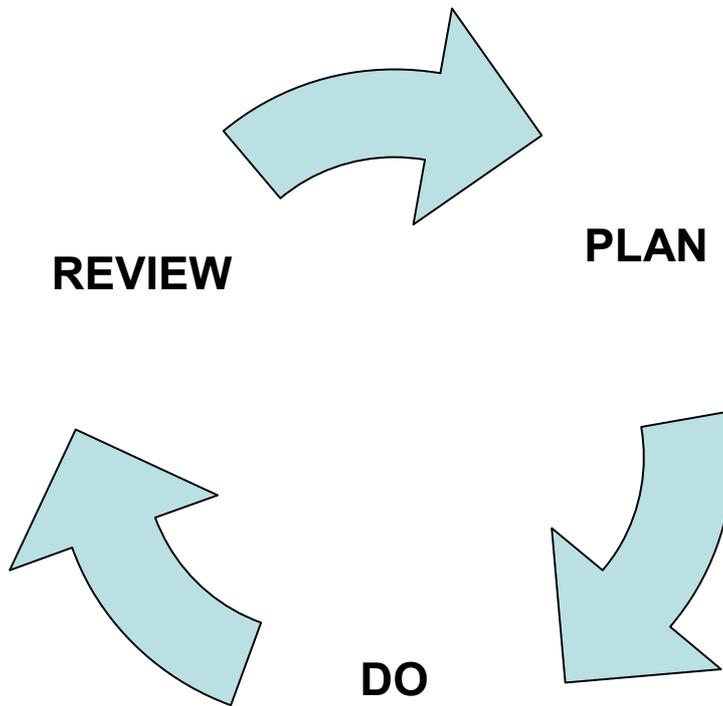
#### Reporting of Accidents and Near Misses

Despite the most comprehensive planning and the best of leadership, on occasions things will go wrong and accidents will occur. When an accident does occur, it is important that it is reported and the circumstances recorded on an accident report form. Where possible, leaders should take photographs of the accident scene and append them to their report. Accident reports should restrict themselves to facts without seeking to apportion blame. The main purpose of the accident report must be to identify circumstances and possible reasons for the occurrence so that valuable lessons can be learned from them. Unfortunately, the accident report will be a vitally important source of reference in the rare event of an injured party taking legal action against a leader.

The best types of reports are '**Near Miss Reports**'. These are occurrences that could have led to an accident but for good fortune or a timely intervention did not. This makes them valuable opportunities to learn lessons without the unpleasant reality of someone being hurt. Near Miss Reports require a 'no blame culture' so that leaders feel able to be open and honest enough to report faithfully the circumstances rather than to engage in the often tempting 'cover up'.

We hope and assume that the vast majority of events will go smoothly and without any such incidents. Regardless of this, the importance of reviewing each event as soon as possible after its conclusion cannot be over-emphasised. A frank and honest review celebrates success and will identify any shortcomings or areas that can be improved. These lessons learned can then complete a circle by feeding them back into the **Planning Cycle**:  
Once completed, and where necessary, RECORD and **FILE** the results.

**Fig 2. The Planning Cycle**



**....and Finally:**

It is easy to become daunted by documents like this one which appear to seek to influence or change behaviour. The reality is that good practice is not complex or difficult and most groups out there are already using good practice most of the time. If you have found anything in these pages that will help you to enhance the safety and quality of experiences for leaders and group members, then I'm delighted. If it simply serves to reinforce what you are already doing then I am content.

I wish you many miles of happy walking.

Dave Horrocks  
Adventure Scotland Ltd  
28/03/09

**Appendix 1**

**SAMPLE RECCE REPORT**

Complete this form after or during a recce of a new walking route. It should be used as an aide memoire when briefing the group and should then be filed to add to a compendium of known routes.

<b>Name of Group</b>	_____
<b>Name of person carrying out the recce</b>	_____
<b>Date of recce</b>	<b>Date of planned walk:</b>
<b>Distance of Route</b>	<b>Time to complete recce</b>
	<b>Estimated time for group</b>
<b>OS Map Sheet</b>	_____

**Route Details:**

**Description of route**

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**Difficulties, Hazards**

<b>Approx. distance from start point</b>	<b>Description</b>	<b>Landmarks</b>

**Weather conditions when recce carried out**

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**How route likely to be affected by poor conditions**

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