



Professional Guide Institute

A Plan To Succeed In Outfitting

Prepared by
Doug Tims

For
The Professional Guide Institute
Idaho Outfitters and Guides Association
America Outdoors

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Preface

This paper is part of the "Outfitter Operations" program of the Professional Guide Institute. Outfitter Operations is one of five core areas of study for the Institute. Origins and Mission, Our Wildlands Heritage, Backcountry Leadership and Wildland Interpretation are the other areas of study.

The mission of the Professional Guide Institute is to identify, enhance and disseminate the natural interpretive and educational resources of the outfitting industry so that outfitters and guides can offer the highest quality experience to the public.

The goals of the Institute include 1) Natural resource protection, 2) Quality public service, and 3) Responsible, shared use of public lands.

You can learn more about the Professional Guide Institute by contacting:

Richard Clark
Executive Director
The Professional Guide Institute
Western Montana College
Dillon, Montana
(406) 683-7822

or

Grant Simonds
Executive Director
Idaho Outfitters and Guides Association
P. O. Box 95
Boise, Idaho 83701
(208)342-1438

For information on programs to improve your outfitting business, contact:

David Brown
Executive Director
America Outdoors
P. O. Box 10847
Knoxville, TN 37939
(423)558-3595

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Introduction

This course on outfitter operating plans is based upon my experience as an outfitter operating under a Forest Service special use permit in the Selway-Bitterroot Wilderness and the Frank Church - River of No Return Wilderness. Through several years as an outfitter industry activist, I have worked with other outfitters who operate under BLM, National Park Service and U.S. Fish & Wildlife permits. This experience has led me to believe that the single most effective tool an outfitter can use to build a positive, successful relationship with agency managers is the operating plan. Beyond the benefit of a good working relationship with the managing agency, the development of a good operating plan will improve your business and add value to your company in the eyes of your employees and customers.

I hope that this course will be of benefit to the new entrant into the outfitting industry. It should also help the outfitter who has had only limited involvement in developing a plan, to the outfitter who wants to upgrade an already good plan, and even to those who might pick up just an idea or two to add to an existing excellent plan. To all I would urge that you contact The Professional Guide Institute with suggestions to improve the course and to share your experiences in building a good plan.

I have tried to use examples in the course from both land and water based operations. The approach and the core elements of a good plan are common to operations that use either horses or boats to move clients.

My view of an operating plan began to change when Art Griffith, owner of Iron Horse Outfitters in Hamilton, Montana, stood up at an Idaho Outfitters and Guides meeting, waved his plan at the crowd and declared, "This is the best insurance policy I've ever had!" I've since worked with Art to share our ideas on plans through the "Operations Network" events at Idaho Outfitters and Guides meetings and similar sessions at Confluence – the annual meeting of America Outdoors.

I've also put into this course ideas I have picked up from Dick Clark, Grant Simonds and Scootch Pankonin from the outfitting industry. Dale Robertson, Steve Morton, Linda Merigliano, Monte Barker, Steve Mealey, Nora Rashure, Dennis Dailey and Lyle Laverty with the Forest Service. LuVerne Grussing and Gary Marsh with BLM have also shaped my thoughts. I thank you all for influencing my views of professionalism and partnership in the outfitter/agency relationship.

A Good Relationship?

Several years ago, I was asked to speak to a group of wilderness rangers about the role of the outfitter and was standing for questions after my presentation. "Doug, what do you do about all the poor people who will never get a chance to float the Selway with you?" was the first question – delivered in a hostile tone.

My first inclination was to respond that it was not an outfitter's job to correct the socio-economic injustices in America. Further, I hadn't seen many urban poor piloting their own \$5,000 rowing rigs down the river under the self-guided side of the allocation. Instead, I told the group about the school bus mechanic from North Carolina who had saved for five years to take his once in a lifetime adventure on the Selway with us.

I felt pretty good about my response, but in the back of my mind it haunted me that perhaps this was an indication that at least some of the people responsible for managing the area where I work did not have a very good understanding of what I did. We always enjoyed visiting with the summer temps we encountered at the ranger station. We welcomed them and other agency representatives into our camps, sharing stories about the river. We watched and listened as our guests spoke of their appreciation of the job our agency friends and we as guides had chosen to pursue.

But I still had doubts. Maybe they didn't know about all we did to make a professional trip appear easy. Maybe they thought we were just lucky folks who showed up at the trail head or launch ramp, ready to take a fun filled trip with little effort. Maybe they thought we were just getting rich hauling rich fat cats through the backcountry.

Connections

My five year permit was up for renewal. I was concerned that my relationship with the agency might not be what it could be. I worried that I was not getting the respect I thought I deserved for my experience and the job I was doing on the river. I had spent years traveling across the country promoting the National Recreation Strategy's call for partnership – yet my own relationship at the ground level might need help.

I remembered an Idaho Outfitters and Guides Association session where a packer, Art Griffith, had proclaimed the value of a good operating plan. Art and I shared the same District Ranger, Dennis Dailey. Dennis had a reputation for being tough. He was also a horseman and knew little about running a river. Art was a bit of a tough character himself, but what impressed me was his statement that Dennis would come into the field, look at his concerns first hand and worked out a solution. Dennis balanced his toughness with fairness and a willingness to hear your side. I decided to take my renewal as an opportunity to educate Dennis about a river outfit, and in the process, teach all his underlings, too.

I wanted to change their view of me and my guides —

Instead of: A Bunch of Lucky Guys Getting Rich Hauling Fat Cats into the Backcountry

By: Adding to their understanding of what is involved in running a professional river operation,

By: Adding value in their eyes of having a professional on the river,

By: Setting their expectations of what I would be doing

I could change their view of me and my company —

To: A Valued Partner Helping Meet the Mission and Purpose of the Area.

Why Do You Need A Plan?

If you operate under a special use permit, you are required by law and regulation to have an operating plan. The National Outfitter Policy, section 41.53j, states that each outfitter will have a plan that specifies -

- The modes of transportation authorized
- The amounts and class of use
- The number of launches and people per launch
- Camps used and people per camp or trip
- Description of proposed use of assigned sites

So by regulation, all I really needed was a plan that said, "Northwest River Company will float the Selway River in rafts, launching eight times a year with twelve guests and four guides using non-assigned, dispersed use camps." Actually, the plan I had been using for the past ten years was not much more than that -- barely half a page!

That may be the requirements of a plan, but what about other goals?

Goals of a good operating plan:

- 1) Meet legal and regulatory requirements,
- 2) Improve the chance of success for your business,
- 3) Add value to your business,
- 4) Lead to longevity through renewal of your permit.

Success - Failing to plan is planning to fail. If you do not take the time to write down in a structured manner how you plan to accomplish your business mission, you increase the likelihood that you will not. Successful outfitters are good at

thinking through the possibilities, assessing the risks, and determining the best course of action when faced with the myriad of options that present themselves in a backcountry trip. We are better when those thoughts have been committed to paper in a plan.

Example: My company, Northwest River Company does not make decisions at the launch site on whether to launch on the river or not. In the calm, undisturbed atmosphere of a winter meeting, my partner and guides have discussed and committed to paper when to go and when to stay. When the pressure is on at the river bank with clients who have traveled thousands of miles, anxious to run the river, there is no decision to be made – just implement the plan. There can also be pressures from the guides who may have varying levels of comfort. With a plan, written by the boss, the pressure is off. The same discipline that comes to dealing with a key safety issue is valuable as well in "how" things work, "when" we do it, "what" we do, "where" we do it and "who" does it.

Value - A good operating plan will add value to your business:

- 1) in the eyes of your employees,
- 2) in the eyes of your customers, and
- 3) in the eyes of your agency manager.

You need to think through what are the qualities of your operation that:

- Determine merit and desirability?
- What is it about your operation that makes employees want to work there?
- What makes customers choose your operation over others?
- What makes a manager desire your operation as a public service provider in the area?

By placing those qualities in your operating plan and sharing them with your employees and managers, you will demonstrate to them the value of your operation. Implementation of the plan with these qualities as its core, will produce an experience that your customers will value.

Renewal - Some managers will have the time and opportunities to experience first hand the value of your operation. They may visit your base, encounter the trip in progress, or hear reports back from other agency persons and customers. Many managers will experience your operation only through your operating plan. By involving the manager in plan development and by making the plan reflect a common outfitter/agency view of a professional, high value operation, there can be only one decision at renewal time – affirmative.

- The operating plan can establish a manager's view of your operation as one that is respected, reliable and renewable.
- The operating plan can establish in advance the ground rules by which your operation is judged.
- The operating plan will get recognition for all the effort you put in to make

- your clients' experiences good ones.
- The operating plan will provide documented evidence of how you and the manager have agreed your operation will be run. This can be important should there be a future dispute, or as often happens, new personnel comes into the area lacking understanding of an outfitter operation.

What needs to be in a plan that will meet requirements, improve chances of success, add value to your business and insure renewability?

- 1) Your company mission,
- 2) Required elements, and
- 3) Value added items.

Company Mission

Mission could also be called your job, duty, purpose or function. It could be stated as simply as "taking people safely into the backcountry by boat, horse, on foot" or whatever conveyance you choose. But you should state a mission in writing as part of your operating plan. You will gain a connection to the values that many people place on the area where you work if you state your mission using the terms set forth in law or regulation as the purpose of the area.

The public statement of purpose could come from documents controlling operation of a hydro power project that controls the flow of the river where you work, or the forest plan that controls management of the area where you hunt. If you work in wilderness, the Wilderness Act is the place to look, or the Wild and Scenic River Act for a designated wild and scenic river. Legislation establishing a national park or a national recreation area is another source. The management plan for a BLM area or wildlife reserve could contain the stated purpose you are looking for. You can get a copy of these documents at your manager's office.

In my case, it is the Wilderness Act. According to the 1964 act, wilderness areas "shall be administered for the use and enjoyment of the American people in such manner as will leave them unimpaired for future use and enjoyment as wilderness, and so as to provide for the protection of these areas, the preservation of their wilderness character". The mission statement for Northwest River Company says that our mission is "to facilitate the public's use and enjoyment of the Selway River and the Selway Bitterroot Wilderness area in a manner that will leave the river and wilderness unimpaired for future use and enjoyment as wilderness. It is our mission to provide a safe, high quality wilderness experience for the public with an emphasis on solitude, enhancing the public's understanding of the wilderness resource and protecting wilderness resources and values." Sound familiar?

I also pay attention to the Wilderness Act's statement "wilderness areas shall be devoted to the public purposes of recreational, scenic, scientific, educational, conservation, and historical use." Outfitters have long understood their mission of providing recreation, and today, we focus more attention on conservation, education

and history. So does my operating plan.

The Wild and Scenic Rivers Act contains this language, "...rivers ... possess outstandingly remarkable scenic, recreational, geologic, fish and wildlife, historic, cultural or other similar values shall be preserved protected for the benefit and enjoyment of present and future generations."

Required Elements

Every plan is required to state:

- Modes of transportation authorized
- Amounts and class of use
- Number of launches and people per launch
- Camps and people per camp or trip
- Describe proposed use of assigned sites

Modes of transportation authorized

This is simply a statement of the type transportation you will use to transport people in the backcountry – horses, rafts, backpacking, llamas, bikes, power boat, etc. You should be aware of what type of transport is appropriate for your area. For instance, motorized equipment is obviously not allowed in wilderness areas.

Amounts and class of use

This is a general description of the type of use and how much you plan to do.

For instance, for Art Griffith's Iron Horse Outfitters, he is running a Fall Hunting Operation and Summer Pack Trips, using a maximum 20 head of stock and he lists how many people will be in each camp.

For a river operation like Northwest River Company on the Selway River, it is described as

Launch Schedule and Trip Lengths -

DATE	Length	Public	Guides	User Days
Mid-May Training Trip	3 days (approx)		5	
June 2 to June 5	4 days	12	4	48
June 8 to June 11	4 days	12	4	48
June 14 to June 17	4 days	12	4	48
June 20 to June 23	4 days	12	4	48
June 26 to June 29	4 days	12	4	48
July 2 to July 6	5 days	12	4	60
July 9 to July 13	5 days	12	4	60
July 16 to July 20	5 days	12	4	60

Camps & People Per Camp

Describe proposed use of assigned sites

The Iron Horse Outfitters plan has a separate section describing each of their four assigned camps. For example:

Battle Creek Camp - Base Camp (hunting camp) - Exhibit "C"

This camp is located on Boise Meridian in SE, SE, Section 5, T33N, R15E.

This camp is currently used as a main hunting camp and a summer pack trip camp for fishing, sightseeing, camping, photography, trail riding and exploring nature. The summer camps for pack trips are on an itinerary basis during the summer months. This camp is also used as a jump-off point for taking hunters to spike camps.

During the fall hunting season facilities at this campsite include tent sites for seven (7) tents, temporary outhouse, meat poles, hitch rails and a portable electronic ribbon corral with nylon mangers, holding a maximum of twenty (20) head of stock.

At this campsite, the maximum number of hunters to be served at one time would be eight (8) and the maximum number of employees to serve the hunters would be seven (7). A maximum number of summer guests to be served from this site would be ten (10) and the maximum number of employees to serve the summer guests would be four (4).

Note the detail that Iron Horse uses in describing the camp, and the variety of uses for the site. He could have said it was just a hunting camp, but a better understanding of the many activities that occur is achieved by listing them (fishing, sightseeing, camping, photography, trail riding and exploring nature).

Value Added Items

This is where we have the chance to dispel myths, educate and inform anyone who reads the plan. Teach them the true complexity and depth of an outfitted experience. We take for granted that our manager and staff know how much we do – but do they? Assume they do not and include as much as possible in writing. Much of it will come from existing documentation: pre-trip information sent to guests, cargo lists, a list of what is in your camp library, information you have received at a local or national outfitter meeting, etc.

Think about who administers your permit and who you encounter during normal operations. Some areas are fortunate to have managers and staff who share your love of the area and have been around long enough to understand your business. But only recently have federal land management agencies begun to train staff specifically in the administration of outfitter and guide operations. You might be dealing with the newest employee on the district. There may be a lot of turnover in your area. If that is the case, then you have the opportunity to do some of the

training – through your operating plan.

Iron Horse Outfitters has a section in its operating plan titled "CONCERNS." In this section, owner Art Griffith candidly lays out the challenges he faces in running a consistent operation when the personnel he works with in the agency is constantly changing and often not trained, "In the past some inexperienced field personnel often performed permit compliance inspections. The Forest Service should have personnel with working knowledge of outfitter operations and problems, handle the outfitter permits, and work closely with the outfitter in bringing his or her operation in line with the area management plan and Forest Service Policy." He states, "It is crucial that the Forest Service have personnel that have a good working knowledge to grade and rate an outfitter operation in a fair and adequate manner." To the agency's credit, the area where Art works is now leading the way in personnel training for outfitter administration.

At Northwest River Company, we use this section to inform everyone on guide requirements, our desired relationship with the agency, the "extra effort" we make in the field, our relationship with other users and our interpretive program.

This is what we include:

Legal Requirements under Idaho Law - Outfitters and Guides in Idaho are regulated under Idaho Code, Title 36, Chapter 21 and Idaho Code, Title 6, Chapter 12. These laws, and regulations promulgated by the state licensing board under them, make activities of outfitters and guides different and more challenging than those of the "self-guided" wilderness user. Section 36-2101 of Idaho Code states, "The intent of this legislation is to promote and encourage residents and nonresidents alike to participate in the enjoyment and use of the deserts, mountains, rivers, streams, lakes, reservoirs and other natural resources of Idaho, and the fish and game therein, and to that end to regulate and license those persons who undertake for compensation to provide equipment and personal services to such persons, for the explicit purpose of safeguarding the health, safety, welfare and freedom from injury or danger of such persons." (emphasis added)

Guide Qualifications & Training - Northwest River Company guides will meet or exceed the minimum requirements for licensed guides in the State of Idaho as set forth in Idaho Code, Title 36, Chapter 21 and Idaho Code, Title 6, Chapter 12 and the rules of the Idaho Outfitters and Guides Licensing Board. The minimum requirements for Idaho guide licensing includes -

- Valid First Aid/CPR Training (renewable every three years);
- Have a minimum of three complete trips on the river under the direct supervision of a boatman licensed for the river;
- If already licensed as a lead boatman on other Idaho classified rivers, the guide may qualify on the Selway with one complete trip on the river under the supervision of a boatman licensed for the river;
- Lead boatmen must have a minimum of six complete trips on the river and be

- recommended in writing for that designation by a licensed outfitter;
- Be recommended to the Licensing Board for guide licensing by a licensed outfitter who certifies that he/she is:
 - Qualified to perform the type of guiding for which he/she applies;
 - Has extensive first hand knowledge of the area and waters where he/she will be guiding;
 - Is able to read and understand a map and compass;
 - Is clean and well mannered with a desire to please those whom he is called upon to serve.

Partnership With the Forest Service - It is the policy of Northwest River Company to pursue a partnership relationship with the Forest Service and its employees. The mission and purpose of Northwest is identical in spirit to the "Caring for the Land and Serving People" mission of the Forest Service.

It is our desire to have Forest Service personnel visit the camps and area we use and interact with the public that we serve. Our experience is that our guests are keenly interested in the job the Forest Service is doing in the Selway-Bitterroot Wilderness area. We view our Forest Service partners as a source of knowledge of the area, coworkers in our role of meeting the purposes of the Wilderness Act and often as friends with a mutual love and appreciation for the Selway.

We also recognize and respect the authority of the Forest Service in their administrative role in the SBW and expect a professional evaluation of our operations. We expect that authority to be exercised in an atmosphere of positive interaction among professionals working towards a common goal. We expect respect from the Forest Service personnel we deal with, as well as their recognition of -

- Northwest and its personnel's experience on the Selway River,
- Northwest and its personnel's knowledge of the Selway River and SBW;
- Northwest and its personnel's commitment to the protection of the SBW resource;
- Northwest and its personnel's commitment to quality service to the public.

It is the desire of Northwest River Company that any concerns the Forest Service has with our operations or procedures on the Selway be communicated by professionals at the District Ranger's or resource manager's level directly to Northwest's owners, Mike McLeod and Doug Tims, not through our respective field staffs. Immediate concerns involving resource conditions or other matters may be discussed at the wilderness ranger / guide level. Northwest River Company owners expect written follow-up from the wilderness ranger through the resource manager or District Ranger of any suggested changes relative to Northwest operations or procedures.

We do not wish to work in an atmosphere where we nit-pick the efforts of each other, looking for the opportunity to "bust the other's chops". We commit that our guests will end their wilderness experience on the Selway with a positive view of the role of the Forest Service. We expect the same of Forest Service personnel in

their interactions with agency personnel and the self-guided public regarding our role on the Selway.

It is our expectation that we will be given the benefit of the doubt that any negative resource or service conditions found on the Selway most likely did not come from us, and certainly are not due to any intentional act on our part. We are human, and will make mistakes, but our commitment to our Forest Service partners is that the balance sheet of our presence and role on the Selway River will be one reflecting an overwhelmingly positive professional contribution to the values of wilderness and the goals of the area's legal and management mandates.

Non-Compensated Wilderness Services - Part of the role of a professional outfitter and guide in wilderness is to make the extra effort in protecting the resource and demonstrating responsible, shared use of the area. We believe our presence on the Selway is a "leveraging" of the resources that the government and the Forest Service are spending and committing to protect and manage this area. We often encounter situations where less caring wilderness visitors have left litter or damaged the resource. This is particularly true on the early trips and in camps frequented by walk-in fishermen and self-guided stock users. It is the policy of Northwest River Company to utilize the human, time and equipment resources of the company to engage in practices including, but not limited to -

- Clean up trash left by other users and pack it out using NW equipment;
- Restore fire pits and rings to a naturalized condition;
- Remove wrecked or damaged equipment left in the wilderness;
- Educate other users who request information on the wilderness resource;
- Provide safety related assistance in emergency situations.

There are several ideas that a horse based operation could put in their plan in this area -

- Trail maintenance
- Clean up trash left by others and haul out using your company's stock and employees
- Emergency help for others, not only the human users, but also stock health or injury.
- Education and information for lost users or those unfamiliar with the country

Interaction With Other Wilderness Users - It is our goal that every encounter we have with other wilderness users, including agency personnel, ends with the other party having a view of Northwest River Company personnel as professional, courteous and knowledgeable. We will go out of our way to assist self-guided floaters if it appears they are open to interaction or in need of assistance. We will always offer assistance in accident situations.

We will be cautious, but open when offering information on the river and conditions. Information about water levels, rapids and potential hazards will likely

be used by self-guided boaters to make decisions in a risky and hazardous environment. The result of a decision to run a rapid is primarily dependent upon the skill level of the individual, which we have no way of judging for sure. Ultimately decisions to accept challenge and risk is the responsibility of the self-guided boater. We will always state the option of portaging ("We've done it"). We will not accept responsibility to lead anyone down river except Northwest River Company guests.

If it appears the desire of other boaters or wilderness users we encounter is solitude, we will respect their desire and not intervene in their wilderness experience.

When encountering stock on the trail, we will communicate with the lead packer, requesting proper positioning as the stock passes. Travel by horse and mule is a historical use of the Selway-Bitterroot Wilderness, representing a cultural value of the area, and we will present it to guests in a positive light.

Interpretive Services - It is of primary importance to Northwest River Company that our Selway River guests have the opportunity for a broad based wilderness experience, including knowledge of the area, its history, flora, fauna and management. We do not do "classroom" style talks. Our goal is to weave within the fabric of our guests' experience, multiple opportunities to learn about and understand the natural world around them. Some of the tools we use include -

- A knowledgeable and personable staff. In selection of guides, we choose naturally inquisitive persons who demonstrate a knowledge and appreciation for the natural world and a never ending thirst for more knowledge. We choose "people" persons who enjoy sharing the wilderness and our knowledge of it with our guests;
- Pre-Trip information - beginning with our newsletter, we set our guests' expectations to learn about wilderness. More information is given in the "Northwest Question and Answer" form. We send all guests a pre-trip reading list and list of vertebrates compiled on the river by a group of biologists we took from Bucknell University;
- Every trip is accompanied by a Library which includes a waterproof copy of the 1964 Wilderness Act, maps, books on Lewis & Clark, Nez Perce Indians, plant identification guides and more.
- Our drive to the river includes stops at "Travelers Rest" site, the West Fork District Office and Nez Perce Pass, where we discuss Lewis and Clark, river management, wilderness management and fire ecology;
- One of our guides is a University of Idaho graduate in Biology and is expert in identification of the plants in the Selway Bitterroot;
- All guides have read the "Moose Creek Ranger District Historical Information and Review" to improve their knowledge of the area;
- Fossils from the large find near Choteau, MT are carried on each trip with a waterproof National Geographic Society map of the North American continent 75 million years ago as an aid in our geology and dinosaur campfire discussions.

Archeological Sites - If, during our wilderness travels, or through the process of

digging a sump hole, we should encounter any artifacts or evidence of use of the area by primitive man, we will engage our guests in an interpretive process. We will involve them in making note of the nature and location of the find and restoring the site to its natural condition. We will notify the Forest Service of the find.

Note two items in this section. 1) We tell the agency we will make mistakes. It is impossible to run a backcountry operation without occasional problems and human error. However, we make it clear to the agency that the net value of our presence will be positive. 2) The last section on "Archeological Sites" was suggested to us by our District Ranger during a review of the draft plan. It is a good section and including it gives partial ownership in the plan to our ranger – a partnership effort!

LOGISTICS INVOLVING GUIDED PUBLIC

Pre & Post Trip Lodging - The public will be met in Missoula at the Village Red Lion at 6:00 PM on the evening prior to their launch date. They will be encouraged to use the Village Red Lion prior to and after the trip, however some public may make their own arrangements. Information on lodging is supplied with the information packet (Exhibit "A"). Lodging confirmations at the Village Red Lion will be made by Northwest River Company personnel.

Pre-Trip Orientation - Pre-trip information begins with the packet sent to potential clients who call or write for information about the Selway (Exhibit "A"). Client receives an orientation talk which shall consist of:

1) Introduction - Leader introduces himself and his position with Northwest River Company. Ask each guest to tell their name, where they are from, what is their occupation, what brought them to the Selway, what are their expectations of the trip.

2) Setting - Welcome to Lewis & Clark Country, the Selway-Bitterroot Wilderness, and the Selway River. We are on the Lewis and Clark Trail and we will be stopping at interpretive sites. The Selway-Bitterroot Wilderness received instant inclusion in the National Wilderness Preservation System in 1964. The Selway River received instant inclusion in the Wild and Scenic River System in 1968. Northwest River Company's goal with this trip is to provide our guests a safe, high quality wilderness experience with an emphasis on solitude and enhancing their understanding of the wilderness resource.

3) River Gear - Each guest is given a dry bag, ammo can and NW duffel bag explaining their use and purpose. Dry bag - If you take proper care of it, taking time to close it and not poke holes in it by dragging or abuse, it will take care of your gear. Ammo Can - for day use items such as camera, sun lotion, glasses, etc.. NW Duffel Bag - For your own personal items and to take with you at the end of the trip (some years a T-shirt is given instead).

4) Slide Show - Present the slide show and narrative - Explains all logistics,

camp procedures and minimum impact talk.

Transportation to the River and Back - The NW 15 passenger van will be used to transport all guests. The day prior to the trip the van will be cleaned and filled with fuel. Oil, tires and lights will be checked. Departure from the hotel is at 8AM on the launch date. First stop is at Bob Ward Sporting Goods in Hamilton for fishing licenses and supplies. While guests are shopping, the van will be driven across the street to top off gas tanks.

On the day prior to the launch date, the NW River Company truck will be cleaned and serviced. Oil, tires, lights, trailer connections and safety chains will be checked. Stop on the way out of Missoula, prior to Lolo and on the Selway River Road after the take out to check the load to see that it is riding properly, all tie downs are secure and no equipment is rubbing or chafing against surfaces that will damage it. The truck will be filled with gas in Hamilton on the way to the river.

Driver gets gas receipts for all purchases and leave them in the glove box. Drivers are not permitted to drink alcohol.

Drivers should drive safely, courteously and within the speed limits. Remember, you are representing our company and industry. Gravel roads represent the most dangerous conditions.

Special Concerns - Highway 93 from Missoula to the West Fork Road turnoff is recognized as one of the most dangerous stretches of highway in the country.

The West Fork Road is narrow and the home of our Selway area neighbors. Be courteous and cautious.

The road over Nez Perce pass to Paradise is narrow, winding and often rutted or slick. Obey the speed limit. Be extremely cautious on sharp turns and watch for vehicles pulling trailers. Drive defensively!

The road from Race Creek takeout to Lowell is the home of our Selway area neighbors, as well as narrow, winding and often rutted or slick. Be courteous and cautious. Obey the speed limit. Be extremely cautious on sharp turns and watch for vehicles pulling trailers. Drive defensively!

Highway 12 is winding and frequented by grain truck and other large vehicles traveling at a high rate of speed. Numerous vehicles are pulling on and off the highway to launch or pick up river craft and may be pulling trailers. Be cautious! Highway traffic violations will be paid by the driver. Any violations due to vehicle irregularity will be paid by Northwest River Company.

If an accident occurs, there is insurance information in the glove box. Never leave the scene of an accident until a police officer arrives and the paperwork is taken care of. Render first aid if necessary, but do not assume guilt or responsibility for the accident ... that is the responsibility of the police. Call the Northwest office to report an accident as soon as possible.

The guests of Northwest River Company are paying for our expertise and knowledge of the hazardous wilderness environment. We can not eliminate risks associated with wilderness travel, but it is our goal to manage the risk involved by informing our guests and utilizing our skills to make their trip as safe and enjoyable as possible.

Introductory Safety Talk at the Launch Site - This talk is tailored to meet the needs of the group. The group is gathered at the bottom of the Paradise launch ramp and their undivided attention is gained. We introduce the other guides. Water conditions and weather dictate some of the content of the talk. We always end the talk with a question to the other guides, "Have I left anything out?" How each guide gives his or her talk may vary, but the following topics must always be covered -

- Check to assure life jackets are properly secured and snug. Show how to adjust.
- Explain the difference between an oar boat and paddle boat (if included on the trip).
- Explain to the group how many will be riding in each raft and suggest that they change boatmen throughout the trip (Offering your ammo can to the boatmen, "Do you have room for me to ride with you today?")
- Show an oar boat and explain how to enter and exit - "Don't grab or lean on the oars!" Clean your shoes before entering the raft. Be cautious about slippery surfaces. Be cautious about slipping on rocks. Explain that each individual boatmen will tie down the ammo cans and show them where to sit.
- Discuss high-siding and if the raft does flip, how to come up with their hands over their heads in case they come up under the raft ... then use their hands to work their way to the outside of the raft. They should move to the upstream end of the overturned raft using the hand line or frame .. don't be caught between the raft and a rock!
- If a paddle raft is on the trip, demonstrate how to sit and brace in a paddle raft. Helmets will always be worn in the paddle boat in whitewater.
- Caution people not to brace a leg under a thwart and to be careful not to extend a leg sideways. More injuries occur when guests collide in a raft than from people falling into the river. Focus on how each guest in each position should brace in.
- Explain how the paddle raft is a team effort and it is the guide's job to coordinate the individual efforts. Show the various maneuvering strokes. Talk about what happens if a passenger falls out: hold on to the hand line if possible, if not onto the paddle that can be extended by someone in the raft.
- Show how to pull someone back in the raft using the lapels of the life jacket, bracing your legs against the tubes and leaning backwards.
- Talk about the flip potential -- same drill as oar rigs. With paddle rafts it might be more efficient to do a mid-river recovery flip than swim everyone to shore or to the oar boats.
- A very careful talk should be given about an unplanned swim. **Emphasis that if a person is thrown into the water it is a SELF-RESCUE situation- be aggressive to save yourself, it is your life!** They should lie on their back and float feet first downstream while backstroking towards the nearest raft or shore. They need to angle their body upstream in the direction they want to go. They should never attempt to stand in moving water! If they are in deep or slow water, they should do a crawl stroke towards the nearest shore. Show a throw bag and

- demonstrate its use, explaining what to do if a rope is thrown to them (grab the rope, not the bag and roll onto your back when being pulled toward the thrower).
- Off river safety should be discussed as well. The most common accident is slipping or tripping getting in and out of the raft, or in camp or on the trail. Be cautious of wet rocks around the river, and sand on your shoes that can cause slipping on dry rocks. Snakes, including rattlesnakes, are native to the Selway area. No rock climbing or diving and jumping off rocks into the river. Filtered water is available in camp. It is the responsibility of all guests under Idaho law to inform the guides prior to leaving camp.

Secondary Safety Talk - In higher water conditions, an extra safety talk will be given at the camp immediately above the Moose Juice section. The same areas will be covered as in the Introductory Safety Talk, with greater emphasis on the increased speed and power of the river in this area and a higher risk of raft upset or passengers taking an unplanned swim. Guest will be moved into rafts depending on the guides' observation of their skills over the past two days.

RIVER & CAMP LOGISTICS

Launch Site Preparations - Guides arrive at the Paradise launch site the evening prior to the launch day. Camping is available next to White Cap Creek one mile up the creek. It is preferable that rafts be rigged at the camp site on White Cap Creek if water level permits, then floated to the Paradise site. If this alternative is not possible, rigging may occur at the Paradise launch ramp.

During the rigging process, do not block the Selway river trail in the event a pack string exits the trail and needs to traverse the parking area. If another party is at the launch site, be courteous, sharing and helpful.

Water Levels Decisions - Northwest River Company deals with varying water levels by making the decision to launch or not, by adjusting the type and size of rafts used and by adjusting running procedures. Water levels are difficult to predict because they are controlled by natural forces and the reports by federal agencies on gauge readings are intermittent and taken by people with varying levels of knowledge of the river.

Decisions on launch and equipment will be made based on the best information available to Northwest River Company the day prior to launch (see Pre-Trip Information Sheet - Exhibit "A").

Launch Decision - At levels below 1.2 feet on the Paradise gauge, the guests and some gear will be flown into Shearer landing strip. Guides will leave Paradise at first light on the launch day with empty rafts, deadheading to meet the guests at Shearer. If the group for the day prior to our scheduled launch has canceled due to low water, or we have had the opportunity to ask and received their permission, the guides will launch that afternoon and go part way to Shearer. At levels below .9 feet, all equipment, guides and guests will be flown to Shearer to start the trip. The numbers of flights necessary to accomplish a low water situation launch from

Shearer will be determined by the air taxi service with the safety of Northwest River Company guests and personnel as the primary factor.

At levels above 1.2 feet on the gauge, the launch, if it occurs, will be staged at Paradise.

At levels between 1.2 feet and 4.5 feet on the gauge, a mix of 14', 15.5' and/or 17' rafts may be used.

At levels less than 4.5 feet, a paddle raft may be used depending upon 1) Water temperature, 2) Weather, 3) Guests Experience, 4) Guest requests.

At levels between 4.5 feet and 5.5 feet, a mix of 15.5' and 17' rafts may be used.

At levels between 5.5 feet and 6.5 feet, a mix of 15.5' and 17' rafts and/or a safety kayak may be used.

The critical high water launch decision occurs between 6' and 6.5' on the Paradise gauge. The general rule (supplemented by decision process laid out in pre-trip information sheet - Exhibit "A") is there will be no launch if the gauge reads 6' or more and is rising.

The general rule (supplemented by decision process laid out in pre-trip information sheet - Exhibit "A") is there will be a launch if the gauge is 6.5' or less and is dropping. Factors included in the launch decision include weather forecast from the National Weather Service, NWS river forecasting models, snow measurements, gauge readings at Lowell and charts showing relations between Paradise and Lowell readings from past years (exhibit "B").

In the event of a high water launch, the first night's camp will be between Running Creek and Shearer. The water level will be marked at camp upon arrival. The next day, if the water is rising, the group will lay over in the same camp. If the water continues to rise the second day and night, the group will lay over again in the same camp. If the water drops to acceptable levels by the fourth day, the group may float out in one day, or two days (including an extra, unscheduled river day) by total agreement of the group. If the water level is still unacceptable on the fourth day, air taxi flights will be arranged back to Missoula.

In high water conditions, a similar review of options will occur at Moose Creek.

On Water Procedures - Each day on the river a lead boat will be designated. The lead boat is responsible for determining river and rapid conditions and warning following boats of any unusual or unique situations (dead fall, log jams, changed rapids, etc.). As a general rule, all boats will gather in the eddy above Galloping Gertie, prior to running that rapid and Washer Woman and Cougar Bluff. As a general rule Ham, Ladle and Wolf Creek will be scouted. The general rule may be waived by consensus of the boatmen if water levels are below 3'.

The normal procedure for running Ham is 2 + 2. Prior to the first two boats running, a safety rope position will be set up below the rapid and a chase boat made ready at the top of the rapid. The first two boats will attempt to catch eddies left and right below the rapid. Then the last two boats will run the rapid.

The normal procedure for running Ladle is 2 + 2. Prior to the first two boats

running, two safety ropes will be set up below on the right. If available, an experienced guest will be asked to man one safety rope, allowing the other guide to man a chase boat ready at the top of the rapid, otherwise, both extra guides will be below manning safety ropes. The first two boats will set up below on the right prior to the second two boats running Ladle.

The normal procedure for running Wolf Creek is 2 + 2. Two boats run first, setting up safety positions below as soon as possible, then the other two boats following.

Camp Set Up - On arrival in camp, organize the group to do a "chain gang" unloading of gear from the rafts. Indicate where the kitchen will be and suggest locations for tents. On the first night organize a tent pitching class for the guests using Northwest tents. It is preferable to use already impacted areas rather than impact a new one. Do not locate tents near standing dead trees (this may be impossible, due to the large number of fire impacted camps on the river, leaving guests open to high risks).

Tell everyone where the porta-potty will be located, as well as the hand wash station. Be observant of guests activities in case someone has not picked up the message on litter or minimum impact practices - make the correction a positive experience. Make sure guides know when and where guest hiking activities are occurring so we can expect their return.

Guides "walk the camp" prior to departure making a last minute check for any litter or items left behind.

Camp Schedules - Coffee will be available at 7:00 AM, Breakfast at 8:00 AM. Launch can occur between 10:00 AM and 1:00 PM, depending on weather, water conditions and the trip leader's goal for the next night's camp. Lunch can be prepared at a lunch stop during the day, after arrival in camp on a day when the start was early, or prior to leaving camp on a late departure day.

Food Handling and Preparation - A clean kitchen is of the utmost importance. All guides will wash their hands prior to food preparation and wear neat, clean clothes while cooking. Dish washing will be done using three buckets using hot soapy water, hot rinse, and chlorine rinse. Cooking will be done on a propane stove, in dutch ovens and on a grill over the fire pan.

Garbage - All garbage that is not burned will be stored in plastic bags, removed from the river, and deposited at a dumpster in Missoula.

Human Waste - Although the Selway River management plan allows the burying of human waste, Northwest River Company has a policy of removing solid human waste. We use a "Johnny Partner" system that contains the material until disposal at a dump station in Missoula.

Waste Water - Waste water from hand wash operations may be cast into the

bushes well above the high water line. Waste water used in washing dishes that may contain food particles will be strained to remove food particles, then poured into a sump hole dug away from camp for the purpose of disposing of waste water.

Fire Pan and Firewood - Although the Selway River management plan allows fires to be built on the ground and ashes thrown in the river, at Northwest River Company, all camp fires will be built in the metal fire pan supplied by the company and carried on every trip. Ashes will be collected from the fire pan prior to leaving camp and stored in the large ammo cans provided for this purpose. Any coals or ashes that have fallen from the fire pan will be collected by shovel and by hand and placed in the large ammo can for removal from the river. Ashes will be dumped at a dumpster in Missoula at the end of the trip.

EMERGENCY FIRES -

In cases where NW guests are caught in unusual climatic conditions involving cold and damp conditions that may lead to hypothermia, a fire may need to be built outside of a normal camp setting. If readily available (not buried in the duffel pile to the extent it will delay meeting the guests' health needs) the fire pan and ash box will be used. If not readily available, at the discretion of the trip leader, a fire may be built on the ground for temporary warming use. If this occurs, it is the joint responsibility of the guide building the fire and the lead guide to assure that the fire is 1) properly contained, 2) fully extinguished at the end of the period of use, 3) fire site is cleaned and naturalized prior to leaving the area. Coals may be dispersed by throwing them into mid stream, as outlined in the river management plan.

FIREWOOD - Only dead, downed wood will be used. Driftwood is preferable. Prior to leaving camp firewood will be either stacked to simulate natural conditions or dispersed along the high water mark simulating natural conditions.

Fishing Practices and Regulations - Everyone who fishes is required to have a valid, current fishing license issued by the State of Idaho. Fishing regulations vary on the Selway depending on time of year and location (main stream, tributary or distance up tributary). It is the policy of Northwest River Company to inform all guests that all fishing on the Selway and its tributaries is catch and release with artificial lures only and single barbless hooks. This is to be done as part of the NW Newsletter, Q&A literature sent to prospective clients, pre-trip orientation talk in Missoula, river side pre-launch talk and in any one on one questioning by fishing guests.

Take-Out Procedures - Like the launch area, we need to be respectful of others at the take-out site. Keep all our gear together and leave room in case another party shows up to share the site. Our first priority is feeding the guests and getting them comfortably on the bus for the return trip, then complete the packing of gear for the trip back to Missoula.

SAFETY

Risk Management - Through the procedures outlined in this plan and the experience of our staff, Northwest River Company seeks to manage the risk of a wilderness trip on the Selway River. Northwest River Company cannot eliminate the inherent risk of travel by boat in a wilderness setting with numerous naturally occurring hazards. Recognizing the inherent risk of wilderness and that it is to be managed as a natural environment, untrammled by man, it is not consistent to alter the wilderness environment to minimize risk, or to hold the outfitter permit holder responsible for abatement of naturally occurring wilderness risks. These risks are part of the natural environment that may not be abated, nor shall the outfitter permit holder be held liable or responsible for such risks or abatement, notwithstanding any clause of the special use permit of which this operating plan is made a part.

Accident Procedures - All guides are expected to be familiar with the following items located in a waterproof bag on the lid of the safety gear box -

- "Guidelines For Handling An Accident" provided by the Northwest River Company insurance carrier (Albany Insurance);
- Accident Report Forms;
- Witness Statements;
- Emergency Phone List;
- Trip Log Forms;
- Landing Zone Guide for Life Flight evacuations.

Evacuation Sites And Radios - Private inholdings and administrative sites are manned intermittently. Backcountry radio access is not guaranteed at any site. In an emergency requiring communication or evacuation, these sites will be considered

- Running Creek Ranch
- North Star Ranch
- Shearer Landing Strip and Guard Station
- Selway Lodge
- Moose Creek Ranger Station

Evacuation Procedures - If motorized evacuation is necessary within a wilderness boundary, approval from the Forest Service will be sought if possible. If prior approval is not feasible, the Forest Service will be notified as soon as possible after the evacuation. If it is necessary to fly a guest out due to injury or illness, see Accident Procedures above. If a guide must leave the trip, two options may be considered -

- 1) Get a message out to Doug or Mike to replace the guide.
- 2) Leave one boat and consolidate the trip to three boats, Notify the Forest Service of the location and plans for removal of the boat that is left.

As I was preparing my operating plan for the next year, I took a small disposable camera on the river and documented several activities, then included the photos in the plan. We use pictures of:

1. Hauling out trash left by others
2. Human waste disposal system
3. Straining waste water
4. Dispersing firewood
5. Cleaning up an old fire ring
6. Water filtration system
7. Propane cook stoves

In the final copy, we used color copies of this page to add a more professional, colorful look to the plan.

Plan Development Process

Putting together a good plan is easier than most people think. You already have most of the components. It is just a matter of organizing them and building on them. I make extra exhibits at the back of the plan out of many of the common items I commonly use in our operation –

- Pre-trip information sent to guests
- Gauge reading chart for the river
- Equipment and repair kit list

Here are the steps as you begin to formulate ideas of what to include –

1. Make a list or outline,
2. Don't forget to sit down with your partner and guides to get their input,
3. You don't have to be computer literate to make it look nice. Most communities have well equipped copy and printing companies, like Kinkos, that have all you can possibly need in the way of computers, scanners, binding and reproduction of color photos. I spent about \$120 for 12 finished copies with a card stock cover, spiral bound and color photos in the back. A little extra effort can go a long way to make your plan appear neat, organized, and professional looking.
4. Do a draft copy in black and white;
5. Contact your ranger and set up a time to review it and seek input;
6. Send the ranger an advance copy prior to the meeting;
7. Honestly seek their input - include it in the final draft;
8. Send your final draft for verbal approval;
9. Do a final master copy with color photos, binding, cover, signatures;
10. Distribute the finished product.

Why did I make 12 finished copies? I thought through all the contacts I have with agency persons before, during and after a trip and made sure each one had a copy. There is a backcountry ranger station we pass on the river that is manned by volunteers throughout the summer. I placed a copy on their reading shelf and came back later to find it dog-eared from use.

Copies go to our guides and we keep a waterproof edition for camp.

Fair Evaluation

Your operating plan is an insurance policy for fairness in the evaluation process. It literally gives you the opportunity to help write the ground rules. You are setting the expectations of the people who will ultimately judge your performance. Don't forget, be frank - you will make mistakes.

How Will You Be Evaluated?

Different agencies in different areas will review your operations in different ways, but they will all have some fundamentals in common. You should ask your manager for information on the evaluation process. Reviewing the process will help you understand what is expected of you. You can use this understanding in the development of your operating plan and in the training and information you give your guides. Think of it as a pre-exam review by a good teacher who may not give you the test up front, but does take the time to review the course and let you know what is important.

Here are some categories that are in an evaluation form in Region One of the U.S. Forest Service. As you can see, most, if not all, are considered in one way or the other in this course. If we as outfitters can derive a clear understanding, in common with our manager, of what is expected of us and how we are going to achieve it, there is much less room for disagreement or disappointment when it comes time to have your operation evaluated and your permit renewed.

General Categories

- Service to the Public
- Compliance with permit conditions
- Compliance with operating plan
- Equipment/Livestock
- Safety
- Resource Protection
- Major incidents, if any

Service to the Public

- Are rates, services and accommodations provided as represented?
- Did holder show courtesy to non-outfitted public?
- Did clients receive educational and interpretive information about area?

Compliance With Permit

- Was application, insurance, signing and payment timely and properly completed?
- Were use reports submitted accurately and on time?

Compliance With Operating Plan

- Holder participation in operating plan preparation.
- Holder's employees knowledgeable of operating plan contents.
- Adherence to operating plan, schedules and itineraries - notification of changes?
- Adherence to camp management plans, permitted structures, use of sites?

Equipment / Livestock

- Is equipment as advertised?
- Is equipment safe and well-maintained?
- Are boats, aircraft or vehicles licensed or certified when required?
- Are livestock treated properly and humanely?

Safety

- Does holder exhibit a concern for health and safety of guests, employees and general public?
- Are staff current with first aid and knowledge of safety procedures?
- Do guests receive a safety orientation to the operation?

Resource Protection

- Does holder use minimum impact techniques?
- Is operation clean and orderly?
- Compliance with fire regulations, fish & game regulations, protection of cultural resources.
- Following appropriate procedures for human waste management and garbage.
- Protection of other resources.
- Protection of threatened and endangered species.

Major Incidents, If Any

This category relates to handling of unusual incidents, accidents, death, significant resource damage, serious violations of law, or confrontations.

Other

- Special efforts worthy of commendation.
- Prior performance deficiencies, if any, corrected.

Scotch's View

Scotch Pankonin is the Washington representative of America Outdoors. Over the years, she has been involved in working out conflicts and concerns raised by both outfitters and managers in their relationships and operations. I would like to end this course with a few pointers from Scotch on the operating plan.

- Operating plans should be built around a series of outcomes;
- Agencies should evaluate outcomes, not process and procedure;
- Process and procedure are individual company's ways of getting to the outcome;
- Operating plans should be a series of subtotals, each an achievable, measurable point of evaluation;
- Plan details of how we get to each point is our agreement on what we are

- going to do to get there -- with options;
- Operations in natural, environments are inherently uncontrollable;
 - Plans and processes must reflect alternate plans and acceptance of some errors and mistakes in getting to the final outcome - a safe, enjoyable trip.

Conclusion

I'm going to assume that most outfitters and guides who read this are motivated to be in this business by feelings similar to mine. I want to spend as much time as possible doing the things I like -- running the river, enjoying the backcountry, sharing good times with others who enjoy nature. You can develop a good operating plan using the guidelines set forth here. Feel free to copy verbatim or selectively edit any portion. It should only take a few hours over a few days to develop a finished product. The end result will be more time over the period of your permit doing the things you like to do.