

**Successful Club
Outings :
Guidelines for Clubs
and Leaders**



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1. Introduction

Representatives from the Gauteng and North West Regional bird club forum held a leadership and outings workshop on 16 June 2012. The workshop was facilitated by Etienne Marais and was attended by nearly 50 people with extensive experience in planning and leading outings. The purpose of the workshop was to share ideas as to how bird club outings can be improved.

This document endeavours to provide a summary of the discussions and proposals that were made at the workshop as well as comments received after the workshop.

BirdLife South Africa would like to thank all the organisers of the workshop, attendees and those that provided comments on the draft of this document, for their co-operation.

2. Layout of document

The document is divided into two main sections. In the first section the responsibilities of clubs in terms of the drafting and implementation of a successful club programme are listed and explained. The second section provides some guidelines to leaders to assist them when leading a club outing.

3. Drafting and Implementation of club programmes

Below are some ideas as to what a club programme committee should consider when designing an outings and events programme. Not all of these will be relevant to each club but will provide a checklist of things to be considered.

Determine the needs of the club in terms of the type of outings needed

Each club has its own culture or way of doing things. This culture is sometimes linked to the size of the club as well as the age groups of the members. This will mean that some clubs are more social orientated while others might take their birding and conservation activities more seriously. When developing the programme for the club the culture of the club should always be kept in mind. In smaller clubs this might be relatively easy, but for larger clubs, with over 400 members, there might be a wide range of needs that the outing programme must cater for. In such instances the committee must consider the needs of all the members by making provision for different types of outings. Some examples include:

Outings for younger birders

- Outings for children at pre-school and primary school level must cater especially for this age group, must be clearly structured and include a variety of activities.
- Outings for secondary school children must cater for their specific needs (must be active, adventurous, maybe linked to looking for lifers or specific birds). Using newer technologies like social media and cell phone technology in innovative ways can be investigated.

Outing for people in the middle age group

Within this age group members will have a wide variety of needs:

- Some people might enjoy social outings with the emphasis on meeting likeminded people, people that enjoy nature and that would like to enjoy nature and birds with other people. However they might not be fanatical birders and would not enjoy outings where birding is the only activity.
- Other members might be fanatical birders. People that enjoy watching and identify birds for long periods. They participate in atlas outings, search for lifers and might be less interested in the social aspects of a bird club outing. They might also not enjoy the relaxed and social atmosphere of a more social club outing.

Outings for senior citizens

The majority of members of most clubs are older than 60 and they provide a valuable service to clubs. Their needs should be taken into consideration when drafting an outing programme. Some things to be considered include:

- Some of the members might be mobility impaired, which include difficulty to walk, bad eye sight and loss of hearing. With older people there is also a health risk. To cater for this age group outings should be arranged which take these factors into consideration.
- The possibility could be considered to grade outings and sites to be visited in terms of the accessibility of the site.

Specialised Outings

In certain clubs there might be a need for specialised club outings where the focus of the outing is much more specific linked to a certain topic or activity. However there is the danger that these types of outings and the people that participate in them can be considered as a cleft or a splinter group and such people can feel alienated from the club. Careful consideration must be given as to how such outings are marketed. It is also important to report back to the club at large as to what happened at such outings. This will contribute to a better understanding by all club members about the purpose of specialised outings.

It is sometimes difficult for smaller clubs to arrange specialist outings. In such instances smaller clubs can link up with larger clubs and the resources required to arrange a specialised outings can be combined.

The following are some of the specialised activities that can be considered:

- Outing to search for lifers or special birds in a region. This might include longer trips and leaders with specialist knowledge will be needed for this type of outing.

- Bird monitoring projects can be interesting club outings. For example ringing allows people to see birds from nearby and learn what ringing as an activity is all about. Atlas outings will contribute considerably to improve coverage in an area while CWAC counts can also be considered for club outings.
- Pelagic trips can be arranged. For clubs that are far away from sea cost can be shared if people travel together or when group bookings are made.
- Extreme outings, that include activities such as rock climbing or long distance hiking, might be of interest to the younger members of the club. This type of outing will require detailed planning and the outing leader will have to be careful selected.
- The interest in digital bird photography has shown considerable growth during the last few years. It is sometimes difficult for bird photographers to take decent photographs during normal bird outings. Specialised outings to cater for the needs of bird photographers might therefore be well supported.
- Outings can also be arranged where the topic is just not birds but where the leader might be knowledgeable about plants, trees or the geography of the area.

The club's programme committee

Below is a list of things that could be considered by the committee or people responsible for the drafting of the club's programme. The list is only a guideline to clubs and not all the list items will be equally applicable to each club. It is up to each club to decide which of the guidelines are applicable to them.

Outings Database

Each club should consider creating a database about venues that can be visited by the club. This could include details about directions, roads, trails, birds that can be seen, contact details, road conditions, etc. The database could be in MS Word format or better in MS Excel which would allow for filtering functions to be used.

The advantage of such a database is that it can be passed from one person to the next when the members of the programme committee changes. This will ensure continuity.

Ethical issues

During outings leaders should be aware of their ethical responsibilities towards the environment in general and more specific birds. In this regard BirdLife South Africa (BLSA) created a code of ethics that can be downloaded from the BLSA website (www.birdlife.org.za). However this code only addresses some of the issues to be considered. Other issues to be considered include the following:

- The outing leader must be conscious of any sensitive or endangered species that might occur and breed in the area to be visited. In such instances nesting sites must be viewed from a safe distance.
- Playing of bird calls to attract birds is a controversial issue. This practice should be limited to the minimum and only be used where absolutely necessary. In areas

where birders regularly visit, special care must be taken when using bird calls. It must be noted that it is illegal to play calls in formal protected areas. The general rule should be that *only the leader* of the outing play calls or have control over who play calls.

- The same rules as for playing calls should apply to phishing.

Legalities, security and safety issues

Clubs must make sure that their activities comply with legislation. This also includes steps to ensure the safety of people attending outings. In this regard clubs should consider implementing the following:

- Indemnity forms should be signed by all club members before an outing starts. Some clubs cater for this by having the indemnity form on the back of the attendance register and when signing the attendance register the person agrees to the terms as stated on the indemnity form. Clubs should remember that all indemnity forms needs to be safely stored for at least one year after the outing. This is a legal requirement.
- It can be considered to have a first aid kit available for each outing. However this will require that leaders know how to use the kit. Another option is to determine before outings if any of the people attending have medical training and can be called upon in case of an emergency.
- Clubs could consider taking out an insurance policy to make provision for any claims against the club that might occur.
- The following is a list of safety issues that can be considered by the club committee when arranging an outing:
 - Cars and traffic in the area can pose risks that must be considered. More and more venues now also allow for cyclists which could lead to accidents.
 - Dangerous animals occur at many sites and care must be taken in such instances. In general the rules of the park or reserve should be followed.
 - Care must be taken during outings for freak weather events which might include lightning and even flush floods.
 - A leader should be aware of the possible risk of fires but also ensure that fires are not created by irresponsible members.
 - Leaders should be aware of the location of emergency facilities near the venue to be visited.
 - It happens regularly during outings that members get lost. Care should be taken that this do not happen and that the group stays together or if the group breaks into smaller groups that all members know the roads of the area to be visited.

Club Programme

The club's outing programme should clearly list the following:

- The purpose of the outing – for example is it a social outing or a special outing as for example a CWAC count or searching for a specific bird.
- Will it entail walking and if so how much and what will the terrain be like (for instance lots of climbing). If not, will the travelling by car require high clearance vehicles?
- Clear directions to the venue. If possible provide co-ordinates. As names of places change, roads get closed for maintenance and sign boards go missing, the directions to venues should be checked on a regular basis.
- If an entrance fee is payable and if so is only cash accepted?

Attendance Register

For each outing an attendance register should be made available. Details that can be listed on the register include:

- Name and Surname
- Contact telephone number
- Indication if the person is a member or not
- Place for signature of member
- Emergency contact number of participant (next of kin or friend)

As indicated elsewhere the indemnity form can be printed on the back of the attendance form.

It should also be considered by the club to have name tags for each person attending. Name tags will make it easier for the leader to remember each member or for new members to get to learn the names of the other members of the group.

Pre-booking

Clubs can consider requesting members to book for all outings or maybe for some outings. There are a number of advantages in doing so:

- Certain outings might have a limit as to the number of people that can attend.
- Viability of outings can be verified if people pre-book. If too few people show interest in an outing the outing can be cancelled.
- As pre-booking requires that people also provide telephone numbers, meetings can be cancelled on short notice due to for example bad weather.
- If there is a change in direction to the venue possible attendees can be notified accordingly.

However pre-booking requires considerable administration and the club must ensure that there is a dedicated person that can handle all communication and correspondence in this

regard. Club members must also clearly understand that they need to pre-book and if they do not do so, that they might not receive important notices as for example when the meeting gets cancelled.

Documentation to the leader

Before each outing the leader should receive a package of documentation which can include:

- Checklist of the birds of the area. This can be a custom list made by the club or an official list of BLSA.
- Briefing letter to the leader indicating the responsibilities of the leader.
- Indicate if a fee to the leader is to be paid and how the payment will be affected.
- Check-list detailing all that needs to be done and checked before an outing in point form.

It should be considered to confirm, maybe through email, the outing with the leader a week or two before the outing.

Sign boards

Clubs should consider designing sign boards that can be used to indicate the location of a venue. These sign boards can be inexpensively made and shared between leaders. If placed strategically they will make it a lot easier for members to find venues.

4. Guidelines for leaders to ensure a successful club outing

Selecting a leader

When selecting people to lead outings, clubs should take cognisance of the fact that within a club there are different types of leaders. Not all members have the social, birding and personal communication skills to lead club outings, but most members might be able to assist during club outings or lead outings that are not birding related. For example some people might have good knowledge of a specific venue in terms of the roads in the area, how to obtain access, safety issues, etc. It is important to use these members even though they might not be able or willing to lead an outing, they can still play a valuable role.

Other members might have expert knowledge of plants, geology or insects. They might be willing to lead talks where the main focus is in line with their expertise or during a normal club outing such a person can share additional knowledge and information.

Preparation for an outing by the leader

The following aspects should be remembered by a leader when preparing for an outing:

- There is nothing worse than having an outing where the leader does not arrive in time. It is therefore of critical importance that the leader make sure that he is at the venue long before the start time to welcome people that might come early.

- Preparation by the leader for the outing is paramount. The following check list can be used to prepare for an outing:
 - Make sure the directions to the venue are correct. Are there any road works that might require a different route to be taken? If so then members should be advised accordingly.
 - If access must be arranged to the venue ensure that the venue will be open.
 - Make sure that the necessary permissions have been obtained to enter the venue. Also make sure or remind land owners in time that the venue will be visited.
 - Make sure that the attendance register, indemnity forms and documentation that might be needed are available. A clip board to place documents on will make it easier for people to sign their names.
 - If a pre-booked meeting make sure that you have all the telephone numbers of the people that will be attending the meeting.
 - Make sure that you know the condition of roads to be travelled in the venue. As a long period of time might pass between club visits to a venue, the condition of roads might have deteriorated and the leader must ensure that this is not the case by visiting the venue beforehand.
 - Decide beforehand on the programme of the day. Decide at what time each spot at the venue will be visited and how long will be spent at the spot. Take toilet breaks and where toilet facilities are located, into account when planning the route and day.

New members

Feedback from new club members is that they sometimes find it difficult to fit into a new group or to join an outing. In most instances they do not know the rules of the outing, cannot identify birds and find it difficult to make conversation. It is therefore important that at each outing the leader will identify people that are novice birders, new members to the club or that attend an outing for the first time. Create a comfortable environment for these members by introducing them to the rest of the group and determine their birding skills.

Giving out name tags, as discussed previously, will also assist new birders to get to know the other members of the group.

However it will always be difficult for a leader to cater for all people in a group, especially if there are novice birders and more experienced birders. It is therefore proposed to implement a “**buddy**” system. Identify one or two other more experienced club members and birders that can assist the novice or new member and make them feel comfortable. If possible buddies should be identified before the meeting otherwise people can volunteer to be buddies when the group meet in the morning. The club should also consider making a list of people that are prepared to fulfil the role of buddies – people that might not want to be outing leaders but might be willing to assist in this way during outings. Some of these people

might also for a period of time become outing leaders as they obtain more experience and obtain more confidence.

For new birders attention to detail is important and even for common species the identification characteristic of a bird should be explained in detail. In so doing the birder must also be taught about basic bird identification skills.

This opportunity can also be used to explain to the novice what birding equipment to use and how to use them. Not all birders for example know how to use binoculars correctly and how to ensure the correct focus settings.

It can also be considered to email new birders the checklist of the birds seen during the outing and ask them to revisit the birds seen by studying them in their bird guides.

Difficult issues on outings

During any outing a leader can experience a number of “difficult” situations. These situations might threaten the success of the outing if not handled correctly. Some of these situations are:

- Change in weather, for example rain, which the leader has no control over. Birders should also be aware of this and should understand the situation. This is especially true for outings that last longer than a day, for example weekend outings, where it might rain for the whole weekend for example. If the leader is aware that it is raining even before the outing starts then the cancellation of the outing should be considered. This can only really be done when the contact details of the people attending are available and people can be contacted telephonically.
- Outings which have a large number of cars can be very difficult to manage. Some proposals to consider are the following:
 - Try to convince members to share cars to limit the size of the convoy.
 - If available use two way radios. This will ensure better communication and bird sightings can be easily shared. If radios are being used all members should know how to work them.
 - Regular stops are important.
 - Consider swapping around the order of vehicles so that people that travelled at the back for the first halve of the outing travel in front during the second halve of the outing.
 - The leader can also consider joining different vehicles during the outing in order to assist all members as much as possible.
- A big concern to any outing leader is that on the day there might be very few bird species at the venue. This can happen at any venue due to weather circumstances, drought conditions, etc. In such instances the leader will have to try and make the outing as interesting as possible. Also consider showing members other aspects of bird behaviour for example show them old nesting sites, explain the habitat the birds usually use or what birds can usually be found at the site. If so, and if the venue

allows the general public to visit the site, a member can come back at a later stage to visit the site and based on the information provided, try to find the birds that were missed during the outing. It is important to provide feedback to the programme committee if a venue produces very few birds. If this happens regularly and it seems as if seasonal differences are not responsible for the low species count, then it should be considered to remove the venue from the outings programme.

- The club should educate members that they understand that birds cannot be guaranteed at each outing. It is the nature of birds that they move around and birds cannot always be assured at a venue. Even though every birder should know this, less experienced birders might not be aware of this fact.
- As members of an outing might include people that are Afrikaans and English speaking, names of birds in both languages should be given if possible. If the leader does not know the names in both languages, the assistance of a person in the group could be requested.

5. Summary

Arranging club outings and leading outings can be perceived to be difficult. However with careful planning by the outings committee and the necessary preparation by the leader, successful outings can be easily arranged.