

ORVIS®

ADVENTURES

FLY-FISHING GUIDE MANUAL

Professional Standards and On the Water Expectations

1. Purpose of This Manual

This manual sets the professional standard for Orvis-Endorsed Fly-Fishing Guides and covers any Guide working at an Orvis Endorsed Fly-Fishing Operation. It is designed to provide Guidelines for safe, consistent, and distinctive guest experiences across Endorsed Operations while giving Guides, Managers, and Owners a clear operating framework that ensures excellence.

This manual will:

- define what professional fly-fishing guiding looks like on the water.
- establish the minimum standards expected of every Orvis Endorsed Guide.
- provide clear operating procedures for guest care, safety, conduct, and trip execution.
- create a consistent structure for training, evaluation, and continuous education for fly-fishing Guides.

An Orvis endorsement is not simply a title. It is an assurance of a standard of conduct, judgment, preparation, hospitality, and performance that must be earned repeatedly in practice. Guests should experience that standard in every interaction, from the first greeting to the final farewell.

While fisheries, climate, and style of service and operational nuances may vary across regions, the core obligations of professional fly-fishing guiding remain unchanged. Every Guide is expected to safeguard the guest, represent the operation with distinction, lead with calm authority, and deliver an on the water experience that reflects well on the Endorsed program and the fly-fishing community.

2. Scope and Applicability

This manual applies to:

- full-time and seasonal fly-fishing Guides
- lead Guides and assistant Guides
- Guide managers and operations managers
- lodge operators and Endorsed operations that employ/supervise Guides

This manual should be read alongside operation-specific policies, state and provincial regulations, rules and laws, land-use requirements, transportation standards, and emergency response procedures.

Where local law, insurance requirements, or operation-specific rules are more restrictive than the Guidelines in this manual, the more restrictive standard applies.

3. Professional Standards of the Orvis-Endorsed Guide

A professional Orvis Endorsed Guide is composed, prepared, observant, and fully accountable for the quality and safety of the day. They lead guests confidently in a dynamic outdoor environment while maintaining the discipline, judgment, and service mindset expected from a premium fly-fishing operation.

Professionalism is expressed through:

- punctuality
- preparedness
- polished presentation
- calm and respectful communication
- sound judgment
- technical field competence
- safety leadership
- emotional steadiness
- thoughtful hospitality
- subject matter expertise

The strongest Guides are not distinguished by ego, volume, or showmanship. They are defined by readiness, restraint, credibility, and the confidence they inspire in others. Technical on the water skills alone are not enough to make a Guide great; guests remember when they felt safe, well led, respected, and genuinely cared for. Professional guiding requires the ability to combine field competence with emotional intelligence, discretion, and consistency of service.

At all times, the Guide is expected to:

- protect the guest
- uphold the reputation of the Endorsed operation
- safeguard the water, boats, vehicles, and equipment under their care
- reflect the standards of the Endorsed program with maturity and consistency

4. Core Values

Every Endorsed Guide is expected to operate from the following principles:

- **Safety Without Exception** - No fish, schedule, preference, or convenience outweighs safety.
- **Professionalism in Every Detail** - A Guide is expected to be prepared, composed, and dependable in all conditions.
- **Hospitality With Substance** - The guest experience is shaped by tone, attentiveness, courtesy, anticipation, and effort.
- **Leadership Through Service** - A Guide leads clearly and confidently while making the guest feel comfortable, informed, and supported.

- **Stewardship of Place and Property** - A Guide respects wildlife, habitat, fish, equipment, vehicles, and the property of others.
- **Provide Consistency That Earns Trust** - Guests should receive the same high standard of care whether the day is easy or demanding, productive or slow.

5. Guide Code of Conduct

Every Endorsed Guide is expected to follow the following standards of conduct:

- **Personal Presentation** - Guides must report to work clean, neat, and professionally dressed for conditions. A minimum standard includes clean body and hair, professional grooming, clean outerwear suited to weather and terrain, clothing in good repair, footwear and safety gear appropriate to the day. The objective of personal presentation is not style or self-promotion; it is credibility, readiness, and respect for the guest experience.
- **Punctuality** - A Guide is expected to be early, not merely on time. The Guide must be fully prepared before any guest contact.
- **Fitness for Duty** - A Guide must be physically and mentally able to perform the job safely. A Guide may not report for duty while under the influence of alcohol or drugs, impaired by fatigue, illness, or medication in a way that compromises judgment, emotionally unsettled to the point that guest care or safety may be affected.
- **Alcohol and Substances** - No Guide may consume or remain under the influence of alcohol or any impairing substance while responsible for guests, boats, or vehicles.
- **Respectful Conduct** - Guides must conduct themselves professionally toward guests, coworkers, managers, landowners, competing outfitters/guides, local communities. Negative talk, gossip, sarcasm directed at guests, and disrespect toward competitors or neighboring operations are not acceptable.
- **Confidentiality and Discretion** - Guides must use discretion regarding guest identity, travel details, habits, spending, and personal information.
- **Integrity** - Guides must be honest in communication with guests and management. If a Guide does not know an answer, they should say so and offer to find it.

6. Role of the Guide in the Guest Experience

Guests do not hire a Guide solely for access to water, fish, or logistical support. They hire a Guide for confidence, safety, instruction, local knowledge, judgment, and the assurance of a quality experience. A premium guest experience is defined by a strong first impression, calm and credible leadership, organized trip flow, thoughtful hospitality, safe and confident on the water management, coaching suited to the guest's ability, enthusiasm without pressure, a polished and appreciative close to the day. A strong Guide can elevate a difficult day through steadiness, attentiveness, and professional care; a weak Guide can diminish an otherwise promising outing through disorder, poor communication, or indifference to detail.

7. Guest Experience Standards

- **First Impression** - Guests should feel welcomed, recognized, and professionally cared for from the first moment of contact. The Guide should greet guests warmly by name when possible, introduce themselves clearly, help guests understand the plan for the day, set a calm, positive tone.
- **Building Trust** - Trust is established through confidence, attentiveness, and clarity. The Guide should listen carefully, ask thoughtful questions, show visible readiness, communicate with composure, avoid talking excessively about themselves.
- **Reading the Guest** - Guides must quickly assess angling ability, fitness and mobility, comfort level with boats, pace preference, expectation for instruction, emotional style and confidence level.
- **Hospitality During the Day** - Guests should experience thoughtful care throughout the trip. This includes appropriate food and beverage planning, comfort checks during travel and on the water, attention to pace, weather, and fatigue, respectful coaching, professional courtesy in handling gear and transitions.
- **End-of-Day Close** - A Guided day should end with clarity and appreciation. The Guide should help the guest return comfortably, ensure equipment is accounted for, review the day positively and honestly, address billing or equipment questions appropriately, thank the guest sincerely, note preferences or follow-up opportunities for future trips.

8. Pre-Trip Preparation Standards

Preparation is one of the clearest markers of professionalism. All preparation should be completed before guest contact whenever possible.

- **Personal Readiness** - Before meeting guests, the Guide must be dressed appropriately, physically ready, mentally focused, familiar with the day's plan, aware of any guest notes or concerns.
- **Weather and Conditions Review** - Before departure, the Guide should review weather forecast, wind, temperature, road conditions, water conditions, local advisories and regulatory considerations.
- **Guest File Review** - The Guide should review available information about guests, including names and party structure, prior visits, experience level, food or beverage preferences, medical or mobility concerns, angling and boat familiarity, notable service preferences.
- **Trip Equipment Check** - Checklist categories include but not limited to; rod/reel, eye protection as required, net, first aid kit, water and beverages, snacks or lunch, radios or communication device, shuttle or route plan, recovery or emergency items/plan, spare clothing as appropriate.
- **Vehicle and Trailer Check** - Before use, the Guide must confirm fuel level, tire condition, lights and signals, trailer connection if used, spare tire presence, basic tools, interior cleanliness, seat belt functionality, emergency equipment presence.
- **Time Discipline** - No guest should be waiting while a Guide finishes avoidable preparation. Last-minute disorganization weakens confidence immediately.

9. Meeting Guests

Meeting guests is a defining professional moment. It sets the tone for the entire day.

- **Greeting Standard** - Upon meeting guests, the Guide should offer a warm greeting, make eye contact, introduce themselves and their role, use names when known, create a tone of welcome and confidence.
- **Initial Conversation** - The Guide should confirm how the guest is feeling, prior experience level, any mobility or medical issues relevant to the day, any immediate questions or concerns, any dietary or comfort needs for the trip.
- **Safety Review** - Before departure, the Guide must deliver the required safety briefing. It may not be skipped, rushed, or assumed.
- **Equipment Assistance** - The Guide should assist with loading gear, confirm what the guest has brought, and ensure the guest is comfortable before departure.
- **Professional Tone** - The Guide should be confident and approachable. There is no place for bragging, ego, visible frustration, or careless humor during first contact.

10. Guest Transportation Standards

The ride to and from the water is part of the guest experience and part of the Guide's responsibility.

- **Vehicle Standards** - Guide vehicles must be mechanically reliable, clean inside and out, reasonably comfortable for guest size and trip length, stocked with required emergency items.
- **Transport Conduct** - The Guide must drive safely and defensively, require seat belt use where available, maintain a professional tone, avoid negative conversation, avoid distracted driving, avoid discussing internal problems, complaints, or gossip.
- **Conversation During Travel** - Travel time should be used to build rapport, introduce the area and conditions, answer guest questions honestly, establish confidence in the day's plan and reiterate the safety talk.

11. Safety and Risk Management

Safety is the Guide's primary responsibility. The Guide is responsible for proactively preventing foreseeable risk, clearly communicating expectations, and taking control when safety decisions are required.

- **Non-Negotiable Safety Principle** - If a situation is unsafe, the Guide must stop, correct, modify, delay, or end the activity.
- **Guide Authority** - The Guide has authority to make safety-related decisions on the water, including decisions involving guests' behavior, weather exposure/conditions, travel conditions, fatigue or physical limitation, suspension or ending of activity.
- **Mandatory Safety Briefing Topics** – At a minimum, every guest briefing should include awareness around water, PFD use/locations as needed, casting control directions, loading and unloading rules on a boat, safe walking and wading protocol, other angler awareness and spacing,

Guide commands and when to stop/reposition, terrain hazards, emergency procedures, eye protection.

- **On the Water Discipline** - The Guide must maintain control and awareness of guest location, casting direction, guest position, terrain obstacles, visibility, spacing between participants, fatigue or emotional awareness, etc.
- **Weather and Environmental Risk** - The Guide must monitor conditions continuously and adjust as needed for lightning, wind, heat, cold exposure, mud/ice/snow travel risk, poor visibility, wildfire or smoke conditions where relevant.
- **Medical Preparedness** - Every Guide must know the emergency action plan, the rally point or emergency pickup location, the address or dispatch details for 911 use, the nearest appropriate medical facility, the designated communication method available in their operation area.
- **Medical Emergency Response** - In a medical emergency, the Guide should:
 1. Stop activity and secure the scene.
 2. Protect guests and themselves from further risk.
 3. Assess the injured person.
 4. Apply first aid within training level.
 5. Activate emergency response when needed.
 6. Communicate location clearly.
 7. Notify lodge/outfitter management as soon as practical.
 8. Document the incident after stabilization as required.

NOTE: If you are not a doctor, administer all required first aid necessary but do not try to diagnose or treat any illness or injury (liability). Stabilize and transport to the most equipped medical facility to your area for treatment.

- **Training Requirement** - Guides are expected to maintain current first aid and CPR training.
- **Incident Reporting** - All accidents, near misses, injuries, boat incidents, vehicle incidents, guest falls, and significant safety concerns must be reported according to operation procedure before end of shift unless emergency conditions prevent it. Write it down as quickly as you can to not forget or distort the facts.

12. On the Water Execution Standards

- **Arrival on the Water** - Upon arrival, the Guide should orient the guest to the plan for the day, safe expectations, terrain and water flow conditions, likely fish movement or patterns, where to stand and when to move.
- **Instruction and Coaching** - Guides should tailor instructions to the guest he has that day. For novice guests keep explanations simple, coach calmly, reinforce safety repeatedly, avoid information overload. For experienced guests respect competence, confirm preferences, still enforce safety discipline, provide local tactical knowledge and refinement.
- **Pace and Energy Management** - A strong Guide manages the emotional rhythm of the day. The Guide should prevent long periods of confusion or idle waiting, keep transitions organized, maintain positive energy without artificial hype, adapt for fatigue, weather, or frustration.
- **Managing Slow Conditions** - A poor fish day is not an excuse for a poor Guide day. In slow conditions, the Guide should remain engaged and positive, explain conditions honestly, look for ways to preserve enjoyment, teach and interpret the environment, protect guest morale without making excuses.
- **Decision Quality** - Strong Guides continuously make decisions about positioning, timing, pace, safety, instruction level, whether to continue, move, modify, or end the activity.
- **Knowledge Expectations** - A professional Guide should be able to interpret and explain the environment in a way that enriches the guest's experience. Guides are expected to develop practical working knowledge of local landscape, waterways and access, fish habitat and behavior, weather effects on the angling, local flora and fauna, basic natural history of the area, operation history and local character. The Guide does not need to pretend to be an expert in everything; they should, however, be informed, curious, and capable of teaching at an appropriate level.
- **Lunch/Snack/ Expectation** – Ensuring guests maintain energy and focus is an important safety consideration to an outdoor environment. Guides should always furnish lunch/beverages that are appropriate for the environment on full-day trips, and snacks/beverages on shorter outings. Both should be communicated in advance with guests to ensure dietary restrictions are accommodated.

13. Brand and Product Representation

Guides are representatives of both the operation, Orvis, and the Orvis-Endorsed program.

- **Orvis Rod/Reel Outfit** – Guides should ensure they have a current Orvis rod/reel outfit that is appropriate for the fishery, available for each guests use.
- **Product Knowledge** - Guides should be familiar with the products used or sold by the operation and able to answer practical guest questions honestly and helpfully.
- **No Hard Selling** - A Guided trip is not an opportunity for a sales pitch. Guests may ask about gear, and Guides should respond helpfully, but pressure-selling is not appropriate.
- **Brand Representation** - Guides should represent Orvis and the operation’s brand through use of Orvis products as appropriate, conduct, professionalism, product familiarity, consistency of service.
- **Use of Logos and Endorsement Language** - **All uses of logos, decals, and endorsement claims must comply with current program rules. A Guide who is no longer part of an Endorsed operation may not continue representing themselves as Endorsed.**

14. Vehicles, Trailers, Boats and Equipment Standards

The Guide’s vehicle, boat, trailer, and equipment reflect the standards of the Guide and the operation.

- **Boat Conditions** - must be clean, mechanically sound, stocked with basic emergency items, suitable for guest transport.
- **Vehicle Condition** - Vehicles must be clean, mechanically sound, fueled, stocked with basic emergency items, suitable for guest transport.
- **Trailer Standards** - Trailers must be roadworthy, connected properly, equipped with functioning lights, checked for tire and bearing readiness, kept neat and safe.
- **Guide Bag Minimum Contents** - Each Guide bag should be configured according to the operation but should include the essentials needed for foreseeable on the water issues. Recommended contents: first aid kit, gloves, basic tools or multi-tool, water, extra eye protection as needed, communication device, weather protection items, notepad and pen, emergency contact sheet, local map or route support where relevant.
- **Inspection Discipline** - Equipment should be checked routinely, not assumed ready.

15. Post-Trip Responsibilities

The Guide’s responsibility continues until the trip is properly closed out.

- **Return to Lodge/Fly-Shop or Drop-Off** - The Guide must ensure guests return safely and comfortably.
- **Equipment Accountability** - Before final separation, confirm that guest equipment has been removed from the vehicle/boat, Guide equipment is accounted for, any borrowed items are returned or logged, and any equipment issues are noted.
- **Guest Questions and Charges** - If the guest has questions about operational charges related to the trip, the Guide should address them appropriately or hand them off clearly.
- **Closing the Relationship for the Day** - The Guide should thank the guest sincerely, express appreciation for the day, confirm next-day details if applicable, note preferences, concerns, and opportunities for future service.
- **Internal Follow-Through** - After the trip, the Guide should complete any required Guide report, incident reports, guest notes, follow-through, vehicle or gear reset, communication with management.

16. Reviews, Feedback, and Performance Management

Guest reviews and client reports are valuable tools for improving performance and maintaining standards. Encourage/Ask the guest to leave a review; it is beneficial for you and the operation Endorsed.

- **Why Reviews Matter** - Reviews help the operation understand whether the Guide delivered, professionalism, safety, hospitality, strong communication, memorable service.
- **Evaluation Criteria** - Guides should be evaluated on punctuality, preparation, safety leadership, guest feedback, communication, organization, professionalism, teamwork, stewardship of equipment and fishery.
- **Coaching and Improvement** - If performance gaps appear, the Guide should receive clear feedback, examples of the issue, coaching expectations, a timeline for improvement.
- **Repeat Business and Reputation** - A strong Guide helps build return visits, referrals, and the long-term reputation of the operation.

17. Training and Required Development

A professional Guide should never stop learning.

- **Onboarding Requirements** - New Guides should be trained on guest experience standards, safety policies, emergency procedures, best practices, vehicle/boat and equipment standards, lodge/outfitter service expectations, reporting requirements.
- **Annual Refreshers** - All Guides should receive annual refresher training in safety, emergency response, first aid and CPR where applicable, operational protocol, guest service standards, equipment and vehicle/boat readiness
- **Observation and Mentoring** - All new Guides will shadow stronger Guides and be observed on the water before being allowed to independently Guide a trip.

18. Employment Reality and Career Mindset

Guiding is demanding work. It requires physical endurance, mental clarity, emotional steadiness, and a consistent service ethic over long days and changing conditions. Those who excel in the profession understand that excellence is built through repetition, preparation, humility, and discipline. They take pride in the unseen work as much as the visible performance.

A Guide who intends to build a respected career takes pride in doing the small things well, caring for guests, fishery, and equipment, maintaining standards even when conditions are difficult, continuing to improve season after season, representing the operation with quiet professionalism

The best Guides are remembered not simply for successful days on the water, but for the confidence, steadiness, and quality of experience they provide to guests.

20. Standard Operating Procedures

- **Pre-Trip Readiness** - Before guest contact, complete: personal grooming and uniform check, weather and route review, guest note review, vehicle and boat/trailer check, Guide bag check, food and beverage check, communication device check, emergency items check.
- **Guest Arrival and Welcome**
 - greet guest by name
 - introduce yourself
 - assist with equipment as needed
 - confirm day plan
 - ask about skill level, concerns, and comfort needs
 - deliver safety briefing
 - load and depart in an organized manner
- **Mandatory Safety Briefing** – Address the following:
 - water awareness
 - casting direction
 - eye protection
 - hydration
 - loading and unloading from boat
 - spacing and positioning while traveling in a boat
 - guide commands/communication
 - terrain hazards
 - emergency plan basics.
- **Medical Incident Response** – In the event of a medical incident:
 - stop activity
 - secure scene
 - assess injury
 - apply first aid
 - call for help if needed

- communicate exact location
- notify management
- document incident
- **End-of-Day Closeout**
 - return guest safely
 - unload guest gear
 - confirm no items left behind
 - answer operational questions
 - thank the guest
 - note preferences and follow-up items
 - reset equipment and report issues

21. Checklists

Daily Guide Checklist

- Clean and professional appearance
- Weather checked
- Guest information reviewed
- Vehicle fuel and condition confirmed
- Boat/Trailer checked
- First aid kit present
- Water and snacks loaded
- Guide bag complete
- Communication device charged
- Emergency plan reviewed
- Day route and timing confirmed

Vehicle and Trailer Checklist

- Tires in good condition
- Spare tire present
- Basic tools present
- Lights functioning
- Hitch secure
- Interior clean
- Seat belts working
- Fuel adequate
- Registration and required documents present

Guide Bag Checklist

- First aid kit
- Gloves
- Flies/leaders/tippet

- Rod/reel Outfits
- Water
- Communication device
- Eye protection as needed
- Knife or multi-tool
- Notepad and pen
- Weather layer
- Local emergency information

22. Sample Guest Safety Briefing Script

Welcome. Before we begin, I want to cover a short safety plan for the day. My top priority is keeping everyone safe and having fun.

Please always be aware of where you are casting in relationship with others.

Always be aware of the water depth and speed. If you are ever unsure where to stand/step, stop and ask. We are not in a rush.

If wading, maintain a distance that allows for visual contact with the group/guide.

While in the boat wear your PFD (as appropriate)

I will direct movement, positioning, and pace throughout the day while in the boat. If conditions change or something feels unsafe, I will stop us and reset. That is part of my job.

If there is an emergency, follow my instruction first. I'll handle communication and next steps. Does anyone have any questions before we start?

23. Sample Incident Report Template

Date:

Guide Name:

Guest Name(s):

Location:

Time of Incident:

Type of Incident: - Injury - Near miss - Vehicle issue - Weather-related interruption - Other

Summary of What Happened:

Immediate Action Taken:

Was Medical Care Required?

Was Management Notified?

Follow-Up Required:

Equipment or Property Damage:

Guide Signature:

24. Final Standard

The standard is simple:

- **Be prepared.**
- **Be safe.**
- **Be polished.**
- **Be steady.**
- **Be memorable for the right reasons.**

An Orvis-Endorsed Guide should leave each guest with confidence in the Guide, trust in the operation, and a strong desire to return. Success is not measured only by the outcome of the fishing. It is measured by the quality of leadership, the consistency of care, the professionalism of the experience, and the standard upheld throughout the day.

(Special thanks to Bennie Atkinson/with Vertical for his contributions in professionalism within the outdoor industry)