

Hiking and Backpacking

This standard applies to Mountaineers sponsored walking, hiking or backpacking trips on established routes longer than 2 miles round trip. This standard applies to any committee sponsoring a hiking or backpacking trip or an Urban/Suburban walk, whether as part of a course or not.

TRIPS

Hiking and Backpacking trips are restricted to maintained and unmaintained trails. Urban/Suburban walks are restricted to urban and suburban streets, parks and greenbelts. The following exceptions apply to Hiking and Backpacking trips, as well as urban and suburban walks:

- Travel may proceed on snow-covered trails, unless the route exposes the party to terrain with avalanche hazards, where a slip is likely to result in an uncontrolled slide, or where snowshoes are required
- Parties may make off-trail excursions as long as the route does not expose any party member to terrain that is unreasonably hazardous for them to cross given their skills and experience. Avalanche terrain should be avoided whenever possible.
- Travel in which participants run for any significant portion of the trip is considered a trail run¹, and is not permitted.

DEFINITIONS

Hikes in The Mountaineers are front-country or back-country hiking trips that take place outside of city or suburban parks, streets or greenbelts.

Backpacking trips include an overnight stay where participants carry in their shelter, food and water. Cell phone service in these locations may or may not be reliable.

Urban Walks are outings that take place on city or suburban streets, parks or greenbelts, where there is consistent cell phone service and nearby emergency access and egress points.

Mountaineers Urban Adventures that do not meet these definitions are not covered by this standard.

DIFFICULTY RATINGS

The difficulty of a hike, urban walk or backpack route will be rated using this scale as a general guide, and the rating must be entered on the activity listing with the specific distance and elevation gain communicated to participants in pre-trip communications.

- Casual Up to 4 miles and up to 600 feet of elevation gain round trip.
- Easy (E) Up to 8 miles and up to 1200 feet of elevation gain round trip.
- Moderate (M) Up to 12 miles and up to 2500 feet of elevation gain round trip.

¹ The Trail Running standard can be found at https://www.mountaineers.org/about/vision-leadership/board-of-directors/clubwide-activity-standards/trail-running/at_download/file.

- Strenuous (S) Up to 14 miles and up to 3500 feet of elevation gain round trip.
- Very Strenuous (VS) Over 14 miles or over 3500 feet of elevation gain round trip.

The overall Difficulty Rating for a trip or route shall be the lowest rating that satisfies both the distance and elevation gain criteria. For example: a trip with 11 miles of distance and 1000 ft of gain would be a Moderate trip.

LEADER RATING

In addition to the route difficulty, a **Leader Rating** must be specified for each activity. This provides the leader with a way to modify the baseline route difficulty based on specifics of how they will lead the trip or for whether it is a hike, an Urban Walk or a backpack. The following are examples of criteria a leader may consider in setting the **Leader Rating**.

- For Beginners Average pace under 1 mph² and no technical challenges or special skills needed
- Casual³ Average pace under 1 mph and no technical challenges or special skills needed.
- Easy Average pace 1-1.5mph and no technical challenges or special skills needed
- Moderate Average pace 1.5-2mph OR an easy route with an overnight pack, or some route challenges (e.g. rough trail, log crossings, steep terrain)
- Challenging Average pace >2mph OR a moderate route with an overnight pack, OR significant route challenges or skills requirements (e.g. fixed ropes, very rugged terrain, steep scree descents, snow or ice crossings; snow camping, bear canister requirement, carrying water to a dry camp)

It is recommended that the leader clearly specify the distance and elevation gain for the route as well as their planned pace, any special technical challenges and special gear, skills and conditioning requirements of the trip in the trip posting within the activity summary and/or the leaders' notes.

PARTY SIZE

The minimum party size for a hike, urban walk or backpack is 3 and the maximum party size is 12 unless other party limits apply.

LEADER QUALIFICATIONS FOR HIKING AND BACKPACKING TRIP LEADERS

Leaders must be Mountaineers members, at least 18 years old, with an up-to-date waiver on file. New hike or backpack leaders are strongly encouraged to go on a minimum of 3 activities with The Mountaineers, preferably with different leaders, before becoming a hike or backpack leader themselves. Individual committees have the discretion to require more or fewer activities based on the applicant's experience and skills.

Leaders must be approved to lead hikes or backpacks by a Mountaineers branch hike, backpack or combined hike-backpack committee, and entered on their committee's leader list. Once approved by one branch committee to lead hikes or backpacks, the leader is qualified to lead hikes / backpacks for any branch but must request to the committee chair to be added to another branch's leader list. The

² Counting rest breaks but not counting lunch.

³ Casual pace is the same pace as for beginners but may be oriented for participants who have experience.

committee chair has discretion to require that the leader complete any additional Branch-specific requirements not met before being added to the roster.

Leaders must demonstrate basic competency in each of the following key elements before being approved to lead a Mountaineers hike or backpack. Under each key element, bullets highlight examples of the skills, behaviors, or knowledge factors expected of a Mountaineers hike or backpack leader within that element.

KEY ELEMENT 1: Group Leadership – examples of expected competencies

- Planning and organization
- Screening of participants (as appropriate)
- Communication (clear and effective)
- Ensures that all party members are accounted for periodically and at the trip conclusion
- Respectful, caring, considerate
- Sound judgment and decision-making skills
- Establishes trust
- Focuses on group well-being and success as a whole
- Adapts as required / situational leadership
- Teaches / coaches and also learns from others

KEY ELEMENT 2: Technical Skill – examples of expected competencies

- Has experience and physical abilities commensurate with the trip being led
- Practices Minimum Impact Procedures / Leave No Trace 7 Principles
- Practices good Trail Etiquette
- Knowledge and use of 10 Essentials

KEY ELEMENT 3: Navigation– examples of expected competencies

- Effectively navigates trail routes with map and compass and any other appropriate tools to “stay found” (altimeter, watch, GPS)

KEY ELEMENT 4: Mountain Safety Skills– examples of expected competencies

- Shows good understanding of major summer and winter backcountry hazards and how to assess the level of risk
- Shows good understanding of methods to prevent, mitigate or manage major risk factors

KEY ELEMENT 5: First Aid and Emergency Preparedness – examples of expected competencies

- Able to handle common first aid situations likely to be experienced on a hike
- Know the “7 steps of Emergency Response” as described in Freedom of the Hills, or an equivalent emergency management process
- Exhibits a good understanding of how to handle emergency situations such as Late return/after dark/lost hiker/off route/lost
- Demonstrates problem solving and leadership skills relating to medical emergencies or unexpected weather and trail conditions
- Knows how to communicate /summon help

KEY ELEMENT 6: Knowledge of Standards and Policies– examples of expected competencies

- Familiar with applicable Mountaineers standards or procedures such as carpools; liability; waivers, postings and closings; ratings
- Knows Incident reporting expectations
- Familiar with maximum group size, permitting, camping, food storage, and other applicable land management agency regulations

LEADER QUALIFICATIONS – FOR URBAN WALKS

Same as for Hikes with the following modifications:

- Key Element 4, Mountain Safety Skills is modified to “Safety skills” and should include the following urban/suburban-specific hazards:
 - Pedestrian safety on sidewalks, shoulders, crossings
 - Traffic, areas of increased crime risk
- Key Element 2, Technical skills - examples of expected competencies modified to reflect the following urban/suburban challenges:
 - Coordinating groups when hikers arrive and depart from different directions due to available parking, bus schedules or proximity of a residence near the hike.
 - Ensuring adequate safe toileting places, particularly given periodic construction and other street closures and homeless pressures in some areas
 - Keeping the group together through regular street crossings and frequent turns
- Key Element 5, First Aid and Emergency Preparedness: Red Cross First Aid/CPR may be adequate for urban and suburban settings in which 911 can summon medical support relatively quickly.
- Required navigation competency still requires basic map, compass and GPS expertise and needs to reflect the complexity of city navigation but does not require the same backcountry and off-trail navigation skills

PROCESS TO QUALIFY AS A MOUNTAINEERS HIKE OR BACKPACK LEADER

Sponsoring committees must have a documented and transparent process, available to any interested member, by which a prospective leader can qualify as a Mountaineers hike or backpack leader. Committees are responsible to verify that prospective leaders are competent in the key elements listed above using a structured, objective method. The following are examples of avenues that could be used:

- Data from application form and/or activity /course history
- Other leader badges (e.g. Climb or kayak leader or other)
- Documented completion of classes (Wilderness First Aid, “Staying Found” or Wilderness Navigation or equivalent external class)
- Hike Leader seminar or equivalent
 - Take home test following leader seminar or as a “equivalency” in lieu of seminar
 - Structured interview with Committee Chair or designate to validate knowledge
- Mentored hike in which the mentor evaluates against the standards to the degree possible

Committees have flexibility to use different combinations of the above methods appropriate to individual leader candidates, maintaining flexibility to recognize experience and training from another activity or from outside the club where it directly applies to the key leader competency requirements.

However, the committee must maintain a mechanism to document their evaluation of a leader candidate against the key criteria so that any outside party can understand the objective method used to qualify the person.

It is strongly recommended that each hike or backpack leader attend a hike or backpack leader seminar including an overview of the standard and all the key leader criteria and expectations, even if they have led other activities for the Mountaineers. Because hikes have no prerequisites, hike and backpack leaders often have to face much greater challenges in screening participants, ensuring basic preparedness, providing first aid and navigation expertise for the group, and managing safety and pace during the activity than leaders of many other activities that have significant prerequisites for participation.

Upon review of the prospective leader's completion of the requirements, the sponsoring committee may grant the applicant a Hike Leader Badge and add them to their hike leader roster, which authorizes them to post and lead Mountaineers Hikes and Urban Walks⁴.

PROCESS TO QUALIFY AS A MOUNTAINEERS URBAN WALK LEADER

A prospective leader who wishes to lead ONLY Urban Walks may qualify with a modified process, at committee discretion⁵:

- Application with subsequent confirmation of intent to lead only Urban Walks
- New Hike Leader seminar OR the Mountaineers self-paced 'Becoming a Mountaineers leader' e-Learning
- A mentored Urban Walk with an experienced Urban Walk leader or Hike leader as mentor
- Red Cross First Aid/CPR, Trail Emergency Preparedness, First Aid for Hike-Backpack Leaders in lieu of Wilderness First Aid/Mountaineering-Oriented First Aid
- Staying Found or Map and Compass course or equivalent, in lieu of Wilderness Navigation

Upon review of the prospective leader's completion of the requirements, the sponsoring committee may grant the applicant an Urban Walk Leader Badge and add them to their hike leader roster, which authorizes them to post and lead Urban Walks.

The committee should communicate in writing to new Urban Walk leaders that leaders who qualify by the modified process must contact their committee to complete the process described in the previous section to receive the full Hike Leader badge before they are authorized to lead hikes outside the Urban Walk definition.

⁴ Hike leaders who plan to lead Urban Walks are strongly encouraged to complete urban/suburban safety training (to be developed) and lead an Urban Walk with an experienced Urban Walk mentor, but these are not required.

⁵ Committees may choose not to offer a modified Urban Walk Leader pathway and badge, and may continue to certify all of their leaders via the process for Hike leaders.

PARTICIPANT QUALIFICATIONS

Unless specified by the leader there is no prerequisite for signing up for a hike or backpack.

Participants are responsible for signing up only for trips that are within their capabilities, wearing suitable clothing / bringing suitable equipment as specified by the leader, and carrying the ten essentials.

Participants on Urban Walks may be asked by their leader to bring a different set of essential gear suited to the particular hazards of the trip to be led (such as reflective clothing and a whistle).

RELATED CLUBWIDE STANDARDS

General Standards for All Club Activities

Comparable Standards

UIAA Standards for Voluntary Leaders and Instructors, October 2006

- Activity Standard 1: Mountain Walking and Trekking
- Leadership Requirements and Guidelines; Appalachian Mountain Club, March 15, 2015

BADGE CRITERIA

Backpacking Skills Badges

Anyone desiring a Backpacking Skills badge needs to submit a request for the badge in writing to their branch's backpacking chair, along with all of their pre-requisite experience – unless the badge is directly awarded from a backpacking course or clinic. That chair then has the lead responsibility to review the applicant's information, follow up as needed, and make the decision to grant the appropriate badge, assuring that the qualifications are met.

Basic Backpacking Skills⁶

Grant this badge if the student can demonstrate that they've attended a lecture or series of lectures/seminars that have delivered the following information at an introductory level:

- Fundamentals: Choosing the type of backpack trip that suits your style, experience and conditioning (basecamp trips, through-hikes, short vs. longer, relaxed vs. intense, etc.), pack weight (base weight and total weight), balancing trail and camp comfort, knowing the weight of your gear and bringing only what you need for the conditions (using a checklist)
- Planning a backpacking trip: Finding info on expected weather and trail conditions, choosing camps, locating water, pacing, daily distance, gear and clothing for the trail:
 1. Choosing and packing a backpack
 2. Footwear: Boots, hiking shoes, trail runners – how to choose based on the trip
 3. Choosing the right clothing; layering concepts

⁶ This assumes that the student already knows the fundamentals of the Ten Essentials, hiking safety, Leave No Trace and trail etiquette, wilderness travel and hazards.

4. Wet, cold or hot weather considerations
 - Staying comfortable while backpacking in wet weather: rain jacket or poncho, pants or skirt; pack cover, pack liner concepts; gaiters; keeping your gear dry
 5. Hydration, carrying water, purifying water
 6. Food: Backpack food options, basics of how to obtain and/or prepare your backpack food, how much food to carry, calorie density, how to package and carry food
 7. Mealtime: Stove and fuel options, fuel efficiency, pots, dishes and utensils, etc.
 8. Food storage: Various options and their pros and cons
 9. Sleep system: Shelter options and how to decide, basic sleeping bag/quilt options and how to decide, sleeping pad options and how to decide, night-time clothing; how to consider your whole sleep system and the expected conditions to pack what you need
 10. Misc: Light, camp/water shoes, gaiters, first aid gear for backpacking
- Awareness of permits and rules: What permits are needed, bringing your dog, rules for locating camps, food storage requirements and use of fire
 - Etiquette and Leave No Trace related to backcountry hiking and camping – choosing a camp, keeping a clean camp, leaving no trace behind, disposal of garbage and waste, trail and camp behavior, interacting with wildlife, use of fire

Advanced Backpacking Skills

Requires the basic skills badge or equivalent as a prerequisite

Grant this badge if:

1. The student has planned and participated in at least 3 successful backpacking trips within the previous 2 calendar years, of which at least one is two nights or more.
 - Car camping does not count
 - Trips may be Mountaineers or private trips (but The Mountaineers do not take responsibility for members' private trips).
 - May NOT be a trip with an outfitter or guide service in which the food and gear and route planning is done by someone else.
2. The student has completed a field navigation class and an outdoor-oriented first aid class within the past 3 years, or can clearly demonstrate these competencies from other sources.

- Navigation could include the Mountaineers Wilderness Navigation, “Staying Found” or equivalent – if person only can show classroom or eLearning training, needs to show practical field experience applying the principles.
- First aid could include the Mountaineers WFA or MOFA class or “Trail Emergency Preparedness” or equivalent– if person only can show classroom or eLearning training, needs to demonstrate good understanding of the principles as they apply to a backcountry emergency.