



Objectives



- Understand the roles and objectives of a leader in the Mountaineers
- Understand the expectations and best-practices of organizing and managing a Mountaineers group trip
- Learn leadership best practices and apply them in scenarios
- Review next steps to become a Leader for the Mountaineers

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Leadership Roles and Expectations

for Hike, Urban Walk & Backpack Leaders



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Why Lead?



- Choose the where, when and pace for trips
- Gain experience with group and people leadership that will carry over into other aspects of your life
- “Pay it forward”

Above all, Leadership is a shift from a focus on individual success to a focus on group success.

➤ *Leaders should love helping people achieve their goals and learn new things.*

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Role of the Leader



- Plan, organize, and execute activities
- Ensure your participants are capable and prepared to succeed on the posted itinerary
- Authority and accountability for the **SAFE RETURN** of your group to the trailhead.
- Help everyone enjoy the trip and build their outdoor community
- Teach and role-model courteous and “leave no trace” trail behavior
- Leave your participants and others you meet on the trail feeling great about their experience.

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Requirements for Leaders



- Current member, at least 18 years old
- Caring, service-focused, respectful, empathetic, safety-oriented
- Have participated in 3 Mountaineers hikes/urban walks/backpacks in the recent past
- Must demonstrate working competence in:
 - *Group Leadership: trip planning, group leadership and communication*
 - *Technical Skills: Hiking and/or backpacking skills including gear, ten essentials, trail and camp skills appropriate for the activity*
 - *Navigation: Route finding, use of maps, and tools to ‘stay found’*
 - *Safety: Identify and mitigate or avoid common hazards*
 - *First Aid and Emergency Preparedness: Ability to handle common on-trail first-aid and emergency situations*
 - *Knowledge of Standards and Policies: Mountaineers and land management agencies*

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Requirements for Leaders (2)



Can show working competence through:

- Application (required)
- Completion of this seminar and a mentored trip (required in most cases)
- Other Mountaineers leader badges or demonstrated leadership experience with other organizations
- Course completion/certifications
 - Wilderness First Aid and Off-Trail or On-Trail Navigation or equivalent are required for backcountry hike and backpack leaders
 - Red Cross First Aid/CPR and Map and Compass plus a pedestrian safety seminar are required for Urban Walk leaders

More about next steps at the end of the seminar

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Legal Considerations



- Even as volunteers, we have a legal **DUTY OF CARE** to follow the **STANDARD OF PRACTICE** in our industry to keep participants safe and deliver what we promise.
 - **Volunteers are protected from individual liability** by Federal and state statutes and Mountaineers insurance as long as they are not 'grossly negligent' – but the club **CAN** be sued based on your actions (or lack of)
- SO...

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Managing Risk and Liability



- Don't lead until you have the basic competencies to do so safely.
- Communicate the hazards in writing to participants before the trip, at the trailhead, and along the way.
- Ensure that your participants are prepared, capable, and understand their responsibility to take care of themselves and others.
- Follow the Mountaineers activity standards for the activity you're leading.
- Understand the 'Seven Steps of Emergency Response' and lead to the best of your ability in an emergency.
- **Bring your participants home safely.**

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Mountaineers Activity Definitions



- **Hikes:** hiking trips of at least 2 miles that take place outside of city or suburban parks, streets or green-belts.
- **Backpacks:** hikes that include overnight stays where participants carry in their shelter, food and water.
- **Urban Walks:** hikes on city or suburban streets, parks or greenbelts - consistent cell phone service, nearby emergency access and egress.
- Party size:
 - Minimum party size is 3 (safety)
 - Maximum party size is 12 (agency rules) unless lower limits apply.

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Mountaineers Activity Definitions



- Hiking and Backpacking trips are restricted to maintained and unmaintained trails.
- Some exceptions are allowed:
 - Snow sections OK unless ice axe and/or snowshoes required for safety on most of the route. Do not lead where potential for uncontrolled slide.
 - Off-trail sections OK unless safe travel requires helmet and/or scramble skills beyond putting your hands down
 - Running and fast-packing trips must be posted as Trail Runs and led by a Trail Running leader (cross-listing OK)
 - Depends on the skills of each particular group
- DO NOT post a hike or backpack outside these boundaries, regardless of your skills.
 - Going outside published standards for the activity you're posting creates legal liability for you and for The Mountaineers.

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Mountaineer's Hike and Backpack Ratings



Difficulty (Route)		Leader Rating	
Easy (E)	Up to 8 mi. RT with <1,200 ft elevation gain	For beginners	Average pace <1 mph - no technical challenges or specific skills required.
Moderate	Up to 12 mi. RT or 1,200 – 2,500 ft elevation gain	Easy	Average pace 1-1.5 mph - no technical challenges or specific skills required.
Strenuous (S)	Up to 14 mi. RT or 2,500 – 3,500 ft elevation gain	Moderate	Average pace of 1.5-2 mph OR some route challenges OR an easy route with an overnight pack.
Very Strenuous (VS)	Over 14 miles RT or over 3,500 ft elevation gain	Challenging	Average pace >2 mph OR significant route challenges/specific skills required OR a moderate route with an overnight pack.

Rate backpacks based on the most challenging or 'defining' day of the trip

Rate trips conservatively, based on the average casual hiker....not based on how easy it would be for YOU. **Regardless of the rating, once on the trail you must manage your hike for the success of the slowest/least skilled participant.**

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Leader Checklists



1. Before the hike
2. At the meeting place/trailhead
3. On the trail
4. In case of emergency
5. After the trip

I will review a few key elements but you are responsible for reviewing the detailed checklists before your first trip and applying as appropriate!

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Mountaineers Covid-19 Policies and Guidelines for Outdoor Activities



- A Code of Conduct governs leader and participant behavior and responsibilities
- Masks no longer required, but leaders and carpool drivers can require them.
- Leaders may ask about vaccination status and require vaccination, or not, if they wish.
 - Asking for proof of vaccination does not violate privacy laws.
 - his expectation should be clearly and respectfully communicated on the activity listing.
- Leaders and carpool drivers may choose to request a negative COVID-19 self-test result in lieu of or in addition to vaccination for vaccine-required programs.
- <https://www.mountaineers.org/membership/the-mountaineers-covid-19-response>

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Before the trip: Trip Planning



- Choose a route that is well within your experience and ability, especially early in your trip leading journey, including seasonal conditions
 - *Special considerations for coastal trips (tides, river crossings), swift-water crossings, travel on snow, bear canister requirements*
- Be aware that some land managers don't allow fee-based trips, larger group sizes or pets or may require a permit.
 - *Check on the land manager's website or on the Mountaineers Route-Place listing*
- Early season trips may involve high water, snow/ice sections, washouts, blowdowns.
 - *If no recent trip reports, scout the route to be sure of the hazards and skill requirements*
- On most Mountaineers trips, as the leader you will be responsible for vetting your participants, helping participants understand the conditions, hazards and fitness/skill requirements and get prepared to complete the trip safely.

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Before the trip: Screening Applicants



Ensure that your participants will be safe and successful and have fun on your planned activity. STRESSFUL BUT ESSENTIAL!!

If your trip requires certain skills and/or conditioning:

- Consider 'Leader Permission Only' option
- If you don't know someone:
 - Check their activity and course history on the website.
 - Ask **detailed but considerate** questions to ensure that they are capable. (email, phone call)
 - ✓ *Recent activities they've been on? Who led? Pace?*
 - ✓ *If they don't know their pace, ask how long it took them to complete a recent trip*
- ***Be caring and respectful*** – explain that you want to be sure everyone will have fun, be successful, and stay safe. Suggest an alternate activity if yours isn't a fit.

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Before the trip: Screening Applicants



Badges can provide valuable information:

- Staying Found (on-trail) or Wilderness (off-trail) Navigation badge will indicate training and field practice in navigation; likewise with Wilderness First Aid badge
- GoHike course badge will indicate someone who has completed a season of regular easier social hikes
- A CHS course badge will indicate completion of a season of increasingly strenuous hikes
- A Basic Backpacking course badge will indicate completion of a set of in-depth lectures, gear introduction and basic backpack trips.
- Basic Backpacking Skills badges will indicate basic competence with gear, trip planning and actual recent backpacking trip experience. (Advanced badge is being reworked)
- ***Should not exclude people from consideration just because they don't have one of these badges. Many people come with equivalent experience outside the Mountaineers.***

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Second Breakout Session - Screening Applicants 20 minutes



Start by introducing yourselves within your breakout group
Then two different role-play scenarios: Same hike, different applicants
One person is leader calling the other person who is the applicant
➤ Scenario 1
Then new people as leader and applicant and do scenario 2

- Report out:
- What tactics worked well in the two scenarios?
 - What did you learn about the pitfalls and how to avoid them?

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Before the Trip: Ten Essentials



- Role-model responsible planning for and use of the Ten Essentials.
- Emphasize critical items in description and pre-trip communications – **and check for the critical items before you leave the meeting place.**
- Leaders have the leeway to specify different gear requirements based on the demands of the trip.
- Emphasize what's critical for safety but don't be more rigid than the circumstances require.
➤ *If someone shows up without a piece of critical gear, can someone else share? Is it truly essential given the route and conditions?*

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At the Trailhead: Begin Building a Cohesive Group



- * **Be clear about the objectives and style of the trip in your trip description and pre-trip communications.**
- * **Set expectations about how Mountaineers groups work beginning with pre-trip communications**
➤ SUCCESS = having fun together, building community, helping each other succeed - getting everyone back safely
- * **Begin at the trailhead to encourage building of relationships among the group members!**
➤ Break the ice by sharing special skills, each person's objectives or reason for wanting to go on this trip
- * **Explain how you'd like them to manage their pace to support each other, then reinforce with reminders and actions along the way**



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Other key trailhead messages



- * Define key supporting roles:
 - First Aid Leader
 - Sweep
- * Encourage communication of safety concerns, illness or injury as you go along
- * Foster an atmosphere of emotional safety....
 - By you as the leader being humble and open with everyone
 - By treating everyone respectfully



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During The Trip



- Manage the pace for safety and morale of everyone in the group
 - *Decide based on experience, conditions and trail hazards whether to keep the group together or let them spread out. **Never leave someone alone.***
 - *At minimum wait at all junctions, significant stream crossings or hazards.*
- Stay vigilant for participant, weather, or route issues.
- Stop and help struggling participants. **Don't go beyond the capabilities of the weakest or least skilled members.**

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Splitting the Group



- The leader has the leeway to allow this as long as you are confident that everyone will get back safely.
 - *If you turn people entirely over to a co-leader, do they have the training & experience to keep the group safe? Do they know what you expect? Do you have a plan for meeting back up?*
 - *Most cases of people getting lost come when groups split up. How will you communicate with the other group? How will you ensure the safety of those who are not with you?*
 - *How will you be sure that no one is left alone 'in the middle'?*
 - *Under what circumstances might it be OK to let someone wait alone or go back out alone?*
- Splitting the group can leave slower participants feeling ostracized and can send message that individual goals are more important than the group's success and enjoyment.
 - *What is the primary objective of your trip? Communicate ahead of time what you will do in this situation.*
 - *Shunning and antagonistic treatment of slower participants is unacceptable behavior.*

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During The Trip (Cont'd)



- If conditions change or the route proves more difficult than the weakest member can complete safely, **find a safer alternative or turn around.**
 - Lead the trip you posted.

Don't be afraid to make an unpopular call -YOU are responsible for the group's SAFE RETURN to the trailhead!

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Making decisions in a group setting



When there really is flexibility for group engagement in a decision, it can bring the group together and add ownership!

- Draw out the quiet people. Watch for the 'herd mentality'.
- Anticipate tendency for people to defer to the leader, and to avoid appearing incapable or weak in front of group members.

Sometimes the leader needs to make a command decision or use 'veto power' for the good of the group.

- Get input if there is time, but if not, explain your rationale and relate it to the safety of the group.
- "Majority rule" doesn't have to be accepted if you don't think it's safe

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Dealing with a difficult participant and/or unacceptable behavior



If a group member's behavior violates outdoor ethics or puts the enjoyment or safety of any other group member at risk, then you need to act promptly to stop that behavior.

- Emotional safety and physical safety are both important!
- Harassment, objectionable language, inappropriate conversations or touching are unacceptable on a Mountaineers activity.
- The Mountaineers have your back when it comes to confronting such behavior!
- First confront the behavior with the individual when it happens, firmly but privately and with consideration.
- The Mountaineers have a [problem-behavior reporting and follow up process](#) for particularly bad or repeat problem behavior. Find the online report form at [this link](#).

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Dealing with a difficult participant and/or unacceptable behavior



- Don't put it off!
- Stay calm and manage your emotional state
- De-escalate - don't be aggressive or confrontational
- Deal in private – don't humiliate someone in front of others
- Use active listening to understand their concerns/point of view
- Explain what you observe and why it concerns you – how could it impact the trip and/or the group
- Ask them to help you resolve the situation – but be firm and specific about changes that need to happen

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In Case of Emergency



We expect our leaders to have basic 'working competency' for how to handle common first aid and other emergencies in the field.

- *Internalize the Seven Steps*
- *Wilderness First Aid badge or equivalent*
 - *Foothills offers a 50% subsidy to take the Mountaineers WFA class for leaders who have led at least 3 hikes, backpacks or urban walks for Foothills in a year*
 - *and 100% subsidy for leaders who have led 15 days or more of hikes, backpacks or urban walks for Foothills.*
 - *New leader? Need to pay for the class yourself, but can apply for reimbursement if you complete the required trips in the same season you took the class.*

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Reporting safety incidents on your trip



What? Any significant near-miss or actual injury/illness situation. Required if outside medical treatment, rescue or hospitalization.

Why?

- To learn from others' experiences! Outdoor activities have inherent risk; we strive to address risk through learning and practice
- Incident descriptions let us visualize similar situations and learn how to avoid similar outcomes
- Tracking trends helps us improve communication on reducing risk

When? As soon as possible after the trip, while the experience is fresh, but after debriefing with your group.

How? When closing your trip, click the button for submitting an incident report

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Leadership Scenarios



Injuries or trip problems often result from system failures or leader decisions that can be examined and addressed to prevent recurrence.

- *Let's explore* how to respond to some common 'judgment' situations using what you've learned today!

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Leadership Scenarios



You will move into a breakout group with 4-5 other students and one facilitator.

Each group will be presented 2-3 real-life leadership challenge scenarios, and discuss the considerations and what they think the leader should do. (10 mins each)

- *Choose one to report out*
- *Note taker who will share the group's conclusions with the larger group*
- *Extra scenarios and facilitator's notes to take home and review*

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Wrapping Up

Board Policies

- Member privacy
- Carpooling
- Youth and family activities
- Pets



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Leader Responsibilities: Privacy



Trip leaders can see all the profile data of people on their rosters, even for those who have private profiles.

- Leaders may extract and use even private participant profile data for planning and safety purposes relative to their trip or seminar.
- However, the data of a person with a private profile cannot be shared with other members.
- Ask for permission before sharing even email addresses with other participants.

- [Privacy policy explained](#)

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Leader Responsibilities: Carpooling

- Mountaineers trips start at the trailhead – our insurance does not allow leaders or staff to *assign or require* carpools.
- Carpool drivers are free to require masks, self-test, vaccination, or not, as they wish, but need to let all riders know in advance.
- Leaders CAN *encourage* carpooling, and *facilitate* by sharing contact info (if authorized by hiker – check & respect privacy settings on profile)
- Willing drivers are a **precious** resource.
 - Remind people that it's an important courtesy to reimburse their driver. You can suggest a reimbursement rate
 - Tell hikers the round-trip mileage to trailhead



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Leader Responsibilities: Youth



- Special requirements for leader training and supervision for anyone under 18 (applies even with their parents on the trip)
- <https://www.mountaineers.org/youth/volunteer-with-youth>
- Seattle now has a Youth Committee that will certify aspiring youth & family hike and backpack leaders including youth-specific first aid and navigation training

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Leader Responsibilities: Hikes with dogs:



- Establish in advance as part of trip posting – don't 'spring' it on the other participants after they've registered.
- Service animals must be allowed to accompany a participant, and you can't ask for medical proof. Communicate the situation to the other participants in advance so that they can opt out if they wish.
- Follow posted trail rules!!
- Don't bring dogs in active wildlife areas
- Be sensitive to dogs in camps with other people



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Steps to certify as a hike, urban walk or backpack leader for The Mountaineers



- New Leader seminar.
- Recent experience on 2-3 Mountaineers hikes, urban walks or backpacks as a participant. (Aspiring youth leaders should get this experience with a youth group.)
- First Aid, Safety and Navigation training:
 - **To certify as an adult hike or backpack leader**, need Wilderness First Aid and Wilderness Navigation/Staying Found or equivalent.
 - **To certify as an Urban Walk leader**, need at least Red Cross First Aid/CPR and Map and Compass course or equivalent, plus completion of the Urban Walk Safety seminar (pedestrian safety).

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Steps to certify as a hike, urban walk or backpack leader for The Mountaineers



- Submit application (goes to the activity chair of the specified committee).
 - *You can lead for any Mountaineers branch, regardless of your 'home branch'.*
- Request provisional leader status from that committee – then organize, post and lead a Mountaineers hike or backpack with an experienced Mountaineers leader as a mentor.
- The mentor will complete and submit a mentor evaluation form. With favorable evaluation, committee will grant you full leader standing & badge.
- Progressions:
 - Urban Walk leaders must gain the additional first aid and navigation training and lead a mentored backcountry hike before leading a backcountry hike.
 - Hike or backpack leaders who want to lead Urban Walks are encouraged to complete pedestrian safety training.
 - Hike leaders must lead mentored backpack to certify as a backpack leader.
 - Scramble or climb leaders still must complete the full certification process to become a hike or backpack leader.

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Next Steps



- Review all the class reference materials
- Get enrolled for any pre-requisites you don't already have
- Submit application form – I'll send this to you after this class.
 - *The committee will prompt you to complete any needed requirements, and to help you organize your mentored lead.*
- Review instructions for posting an activity on the Mountaineers website and managing an activity roster – under "Volunteer" ➔ "Schedule and Manage". Great video training can be found there.

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