

Trip Leadership Scenario Discussion Exercise #1

Instructions:

- Name a note-taker who will also report out for the group.
- Have someone in your group read your scenario out loud.
- Discuss the following questions:

You round a corner and the first person in line slips and falls a considerable distance down a steep talus slope. The person is able to respond to questions, but is shaken up and you don't know their condition. Immediately, someone starts rushing down the slope to help and another person begins to take off to see if they can find a cell signal. You're 6 difficult miles from the trailhead, it's mid-afternoon and there are just 4 of you including the injured person.

- What are your most critical responsibilities as a leader in this situation?
- What are some of the unique challenges you face because of the circumstances? (group size, time of day and distance from TH)
- What are some of the options available to you, and their pros and cons?
- What do you think that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #1

- Stage 1: Immediately after incident
 - Stay calm and don't make the situation worse
 - Immediate first aid assessment
 - Confirm group all accounted for
- Stage 2: Immediate risk under control
 - Assess the Situation
 - Plan
 - Implement
- Stage 3: Ongoing until resolution
 - Reassess – repeat stage 2 as required

Key Ideas:

- Even before attending to the injured person, the leader must first ensure that no one else will get injured! Gather the group, assess the hazards, make a plan. Recognize the natural inclination to 'leap to action'.
- Discuss the implications of the distance to the trailhead and the time of day in the appropriate course of action. Note how long it typically takes to get a rescue in the best of circumstances (6-8 hours) – are you prepared to spend the night? to walk out after dark?
 - NOTE: we err on the side of walking the person out if at all possible! However, to do that you need enough people to carry the person if they can't walk (and this is exhausting work!)
- Discuss how to deploy the 3 uninjured people left in the group. Should you ever let them split up? When and why?
- Connect to the need for the 10 essentials in a situation like this.
- Stress the importance of thinking through an emergency plan for every trip – communication device, emergency contact numbers, first-aid leader.

Trip Leadership Scenario Discussion Exercise #2

Instructions:

- Name a note-taker who will also report out for the group.
- Have someone in your group read your scenario out loud.
- Discuss the following question:

A new trip leader is leading a trip on a well-established trail that was posted as a moderate hike. Midway along the route, three gung-ho participants want to try a more challenging off-trail route (with some exposure and bouldering). An older, very experienced participant with two buddies in the group says “piece of cake, I’m going to do it” and prepares to take off. Two other participants without much experience seem worried but don’t speak up.

- Why is this a problem? What could go wrong/ what are the possible negative consequences if handled incorrectly?
- What are your options as a leader in this situation? What is your most critical responsibility as the leader?
- What do you conclude that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #2

- Discuss why it is inappropriate to change a trip in mid-stream in a way that is more demanding and/or technically challenging than the trip that was posted.
- If people don't voice objections, does that mean it's ok to assume that they are OK with a decision? Discuss how peer pressure can lead some people to keep quiet even when they are seriously concerned. Importance of reading unspoken signals; knowing the skill level-capability of their participants; drawing out responses from everyone in the group.
- Is it appropriate to let the three gung-ho participants to go their own way and meet up later? Why might this not be a good idea?
- What could/should the leader have done to proactively minimize the probability of the incident?
 - Setting expectations at the trailhead, engaging on trail
 - How can age, gender and experience level play a role in leadership dynamics?
 - How can a younger and/or less-experienced leader overcome these dynamics?
- Prompt discussion on conflict management techniques that de-escalate and bring the group into focus on the original trip.
 - How might you manage the situation with the experienced older man so that you work together rather than at cross-purposes?
- What leadership styles are appropriate? How might the leader use different styles at different times? (Pacesetting, Authoritative, Coaching, Democratic)

Trip Leadership Scenario Discussion Exercise #3

Instructions:

- Name a note-taker who will also report out for the group.
- Have someone in your group read your scenario out loud.
- Discuss the following question:

Your group is out hiking on a very cold day. The trail abruptly drops off in a steep and icy bank to a stream crossing. You lead on down the bank and across the stream, and most of the group follows you, though the way down proves to be quite treacherous. After you've reached the other side, you look back and see a hiker who is terrified to descend the icy slope and won't go any further. He yells across that he wants to go back to the trailhead. You go back over and cut some steps which allow him to come down safely and continue on with the group; after doing that, others tell you that they were just as terrified but didn't say anything and just went along.

- Why is this a problem? What could go wrong/ what are the possible negative consequences if handled incorrectly?
- What are some of your options as a leader in this situation, and their pros and cons based on your roles and responsibilities as a Mountaineers trip leader?
- What does your group conclude that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #3

Key Ideas:

- Did this leader lead for the success of the group or just power down the trail? Discuss what the leader might have done differently to reduce the group's exposure to risk.
 - Stop when you recognize any significant hazard, and talk about how you might reduce the hazard before launching the group into harm's way.
- How did 'group-think' or unwillingness to speak up affect the safety of the group?
 - What is the role of participants on a group trip, and how do you as a leader encourage it?
 - Discuss how a leader can pull out individual concerns and capability even when some individuals hesitate to admit to fear or weakness.
- Sometimes a leader might be very competent and confident to handle a hazard so that it seems easy to them, but this doesn't mean that it will be easy for all of your participants.
 - Whose perspective is most important here?
 - What can you do as a leader to step back and see the demands of a route through the eyes of your participants?

Trip Leadership Scenario Discussion Exercise #4 -

Instructions:

- Name a note-taker who will also report out for the group.
- Have someone in your group read your scenario out loud.
- Discuss the following question:

Your hiking group on a trip published with a fast pace turned out to have a mix of some very fast hikers and a couple of people who were slower and who fell further and further behind. You told the faster people that they could go ahead and off they went, agreeing to wait at junctions (there weren't many junctions ahead so pretty soon they got well out of sight of you and the slowest hikers). When you got back to the parking lot, you were confronted by a person who said that they ended up between the slower and faster people, all alone, and felt – in their words – “totally abandoned”. How might this have happened, and what could you do on future trips to keep it from happening again?

- What are the most important issues and risks here?
- What are your options as a leader in this situation? What are your responsibilities? Do some of them seem to conflict? What priorities should override the others?
- What does your group conclude that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #4

- What does it mean to be a Mountaineers group? What are the goals of a Mountaineers trip?
 - Enjoyment and safety are paramount, completing the destination is secondary.
- Differences in pace in a group can have big impacts on morale – the fast people get resentful, the slow people get discouraged. What is the leader’s responsibility here? Discuss how a leader might anticipate and head off these reactions, or to help to reduce them once they begin to occur.
- Help the group flesh out the choices they have. Under what conditions might it be safe enough to let the group split up?
- Under what circumstances might it be OK for you to let the fast group go? What are the risks you face when you do that, and how could you reduce the risks? (Risks of letting a fast group go ahead include them taking a wrong trail, not stopping when you wanted to stop for lunch or turnaround, them encountering a hazardous area and making a decision you would not want them to make, someone getting hurt in the faster or slower group without the whole group’s resources.)
 - What are the upsides and downsides if the group splits up with two co-leaders? What message does it send to the slow person if everyone else groups up and goes ahead without them?
- How possible is it that someone gets left alone between the fast and slow people? Is this ever OK? How might you prevent this from happening?
- What if the slow person announces that they don’t want to hold everyone up, and they just want to go back to the trailhead alone? Under what circumstances would you send someone back, and how do you ensure that they make it back safely?
- The leader does have a responsibility to help both the faster and slower hikers to have a good time. However, the leader’s first and foremost responsibility is to help everyone have a good time and get back to the trailhead safely. Every other decision must be based on the leader’s judgment about how to accomplish this.
- How does the fact that it was posted as a fast-paced hike change the answer? If someone signs up who isn’t capable of meeting the posted pace, is it their “fault” and they should just expect to be left behind?

Trip Leadership Scenario Discussion Exercise #5

Instructions:

- Name a note-taker who will also report out for the group.
- Have someone in your group read your scenario out loud.
- Discuss the following question:

Along the urban-walk route you have chosen, you and your group pass through a crowded farmer's market that leaves the street much more crowded than you expected. You ask the group to keep together, but after proceeding a short way you can no longer see half your group. What do you do? What steps could you have taken to prevent this problem or at least make it less likely?

- What are your options as a leader in this situation? What are your responsibilities? Do some of them seem to conflict? What priorities should override the others?

- What does your group conclude that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #5

- What does it mean to be a Mountaineers group? What are the goals of a Mountaineers trip?
 - Enjoyment and safety are paramount. Visiting a particular feature along the route that you posted and think will be of interest is secondary.
- Taking a group down a busy street that could be crowded and with lots of potential distractions along the way means that it will be difficult to keep everyone together unless the leader gives very clear instructions that are followed and s/he has a way to be easily identified in a crowd. What is the leader's responsibility here? What can the leader do once the group members are immersed in the crowd, no longer close together and can't all be easily be seen?
- Discuss how a leader might anticipate this problem and work out ways to ensure the group members don't become dispersed and get left behind. For example, did the leader scout out the route on a day the farmers market is open and is there a back-up route if the street is too crowded? Is the leader wearing or carrying anything that will make her/him stand out in a crowd?
- Under what conditions might it be safe for the leader to say: "Meet me in 15 minutes at the far end of the market?"
- Help the group flesh out the choices they have.
- What are the risks you face when you let the group split up for 15 minutes? How could you as leader reduce the risks and what would you do in 15 minutes time if all the group had not reformed at the far end of the market?
- Does the fact that the trip was posted as visiting the farmers market mean that you absolutely have to take the group through it if the route is a lot busier than you expected? Did you plan a back-up route that would avoid the market in these circumstances?

Trip Leadership Scenario Discussion Exercise #6 -

Instructions:

1. Name a note-taker who will also report out for the group.
2. Have someone in your group read your scenario out loud.
3. Discuss the following question:

On day 1 of your three-day backpack trip, one participant clearly is struggling to keep up (even though you had talked with her before she registered and she seemed experienced and capable). She slowly ends up further and further behind and you ask your co-leader to walk with her. The faster people get to camp an hour ahead, and after the slow person gets to camp and everyone is having dinner you hear some of the group members loudly talking about how the slow person should never have been allowed to come and that she should have been more responsible to bring less weight, get in shape or stay home. The slow person obviously hears and leaves the camp circle in tears. Other group members are clearly uncomfortable but don't speak up. What would you do? You have two more days to go.

- What are your priorities as the leader of a Mountaineers group to deal with the situation you now find yourself in?
- What steps would you take when you observe this situation? How might you apply what you learned about dealing with conflict and difficult behavior? How could you help the slow person succeed?
- How might you have avoided this situation before the trip and/or at the trailhead? How might you have created and reinforced an atmosphere of mutual support?

Facilitator Notes: Scenario Discussion Exercise #6

- What does it mean to be a Mountaineers group? (Mutual support and creating a culture of caring is a central aspect that sets our community and activities apart.) What are the leader's responsibilities in this? What are the participants' responsibilities?
- What are the consequences of NOT dealing with harmful behavior like this? Emotional safety is a priority as much as physical safety.
- We talked in the seminar about unacceptable behavior and steps to cut off such behavior and diffuse conflict. How might you apply those steps in this case?
- What can you do to help the slower person succeed and feel good about the trip going forward?
 - Re-create an atmosphere of support and caring – make it clear to the inconsiderate people what needs to change
 - Speak privately to the slow person. Listen and empathize. Give them options that could help them get closer to the target pace.

Under what circumstances might it be the right thing to send the person back?

Trip Leadership Scenario Discussion Exercise #7

Consider this scenario on your own. What would you do? Answer the questions yourself and then review the facilitator notes for additional insights.

You are leading a 3-day 18-mile spring backpacking trip with expected nighttime temps in the low 40s and a chance of rain (which you told people in advance). You get to your first night's destination and discover while everyone is setting up camp that one of your participants has 'gone ultralight' with a thin tarp, limited clothing, a thin poncho and only a couple of bars and a Big Mac (purchased the previous day) to eat. The participant is adamant that she has 'done just fine' with this setup on long trips before and is very defensive when concerns are raised.

- What are the most important issues and risks here?

- What are your options as a leader in this situation? What are your responsibilities? How do you handle the defensive reaction? How might you salvage the trip?

- How might you have been able to avoid this situation? (You did tell everyone in advance about the expected weather and what gear to bring)

- What do you think that the leader should do?

Facilitator Notes: Scenario Discussion Exercise #7

- Sometimes trip participants do not read, or will choose to disregard, instructions from you about gear for safety under the expected conditions. What can you do as a leader to make sure that the most important safety considerations are actually followed?
- People can get very strong convictions about their gear choices and we do want to be supportive of different gear priorities. How could you create a conversation that would convey the importance of a person's gear choices to the person's safety, and therefore the possible outcome of the trip for the whole group?
- When might it be appropriate for you to support an individual's decision to accept a bit more discomfort and when would it be important for you to insist on a different course of action?
- How might you foster a conversation among the whole group about gear and food sharing with the person without that person feeling belittled?

Trip Leadership Scenario Discussion Exercise #8

Instructions:

Consider this scenario on your own. What would you do? Answer the questions yourself and then review the facilitator notes for additional insights.

You are leading a trip with some challenging navigation, and you are anxious that your participants respect and follow you. You start by confidently leading from the front with a compass and map, but wonder why no one seems to be offering input. At one point you take a side trail that leads to a very steep and sketchy gully. After struggling down for a ways, one of your group members who had their GPS out hesitantly says that they thought you were on the wrong route, but didn't want to insult or anger you by challenging your authority.

- What is an 'expert halo' and how does the concept fit in this situation? How can the 'expert halo' cause danger for a group?

- As the trip leader, what might you have done from the beginning to create an atmosphere where everyone feels safe and encouraged to bring their skills and ideas into play?

- What could you do through the rest of the trip to foster an environment where your group will speak up and participate in key roles and decisions?

- How can you share leadership and still maintain the authority to make tough command decisions when necessary?

Facilitator Notes: Scenario Discussion Exercise #8

- If the leader could go back to the trailhead and start over, what might they have done differently to foster a more collaborative atmosphere in participants and as a leader?
 - Emphasize the role of humility and self-awareness in a leader to address the anxiety they were feeling.
- Does leadership require you to be the expert on all aspects of the outdoor activity?
- How might the leader have done better at checking in with the group?
 - Emphasize non-verbal cues AND direct engagement with members of the group (“touching base”). Would this have led to a different outcome?

Trip Leadership Scenario Discussion Exercise #9

Consider this scenario on your own. What would you do? Answer the questions yourself and then review the facilitator notes for additional insights.

At camp on the first night of a backpacking trip you notice that a group of prior friends are sitting together joking and laughing with each other and two people who haven't met the others before are sitting quietly on the other side of camp not engaging with the others and obviously feeling like outsiders.

- What is the risk on a multi-day trip if this situation doesn't change?

- As the trip leader, how can you help a group pull together and engage with each other? How do you support prior relationships while also fostering new relationships among the whole group?

- How might you reduce the likelihood of such situations in the way that you communicate with participants before the trip?

Facilitator Notes: Scenario Discussion Exercise #9

- What does it mean to be a Mountaineers group? What are the goals of a Mountaineers trip?
- Discuss how the leader can set the stage for relationship building and camaraderie from the beginning of a trip without it feeling 'forced'?
- Discuss what a leader can do to pull the group together if they don't notice the issue until later? When would it be fine to leave it alone?
- What are some danger signs to watch for that the two people who are quiet are not responding that way because of harassment, objectionable behavior or language?
- What would be the appropriate steps for you to take if you do discover such inappropriate behavior occurred?
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Trip Leadership Scenario Discussion Exercise #10

Consider this scenario on your own. What would you do? Answer the questions yourself and then review the facilitator notes for additional insights.

You're leading a backpack with a great group, not very experienced but very eager to complete your circuit of a rugged mountain route. The goal is the top of a peak where you hope to camp and watch the sunset— an experience you know people will remember forever. However, from the first day it's been raining and a sense of misery and discouragement is developing. Tomorrow you could take an early exit route back out to town, forgoing the peak and sunset, or you could continue further away from civilization, ford a very cold stream, and take on a steep scree climb to the next camp. The group has appropriate gear to be safe, people are staying dry (enough), and the weather is supposed to improve before your planned summit day, but multiple people are beginning to chatter about bailing out for a cheeseburger and hot shower.

- What can a leader do when a trip starts out under adversity, to help a group stay positive and push through misery to reach a goal?

- What are your priorities as the leader here to deal with the situation you now find yourself in?

- When might it be more important to listen to the immediate concerns and help people get out to comfort, or to build spirits and teach people to find the wherewithal to complete a goal under tough circumstances?

Facilitator Notes: Scenario Discussion Exercise #10

- What impact does the lack of experience in the group have, given the adverse conditions?
- Under what circumstances might it be best for the leader to support the group going out? To encourage the group to keep going?
- How might the leader turn the attitude back around to positive? (Return focus to the group goal and why it was so appealing, use humor, stop for a hot chocolate and a change into dry socks to build spirits back up)
- What leadership style would be most impactful? Does this change as this trip and the conditions develop?
 - Should the leader be “out in front leading” or “mixing with the group and checking in”?
 - When does leadership occur? Is it a series of specific events/decisions? Guide the conversation towards leadership as an ongoing and continuous activity that starts even before the trailhead and continues throughout the trip.
 - A coaching/mentoring approach with inexperienced participants can set the stage for a successful trip and address doubts/anxieties early on as the leader helps get the participants in the right mindset and focused on the goal despite the weather.
- Later, a democratic approach to the decision to leave the trail offers an opportunity both for group decision making. How can you help them learn from the experience?