

A scenic mountain landscape featuring a calm lake in the middle ground, surrounded by evergreen trees with some autumnal tints. In the foreground, there are large, grey, jagged rocks. The background shows a rugged mountain range under a clear blue sky.

New Hike-Urban Walk- Backpack Leader Workshop

Sponsored by the Foothills Branch

Hiking-Urban Walking-Backpacking Committees

The session will begin at 6:15PM.

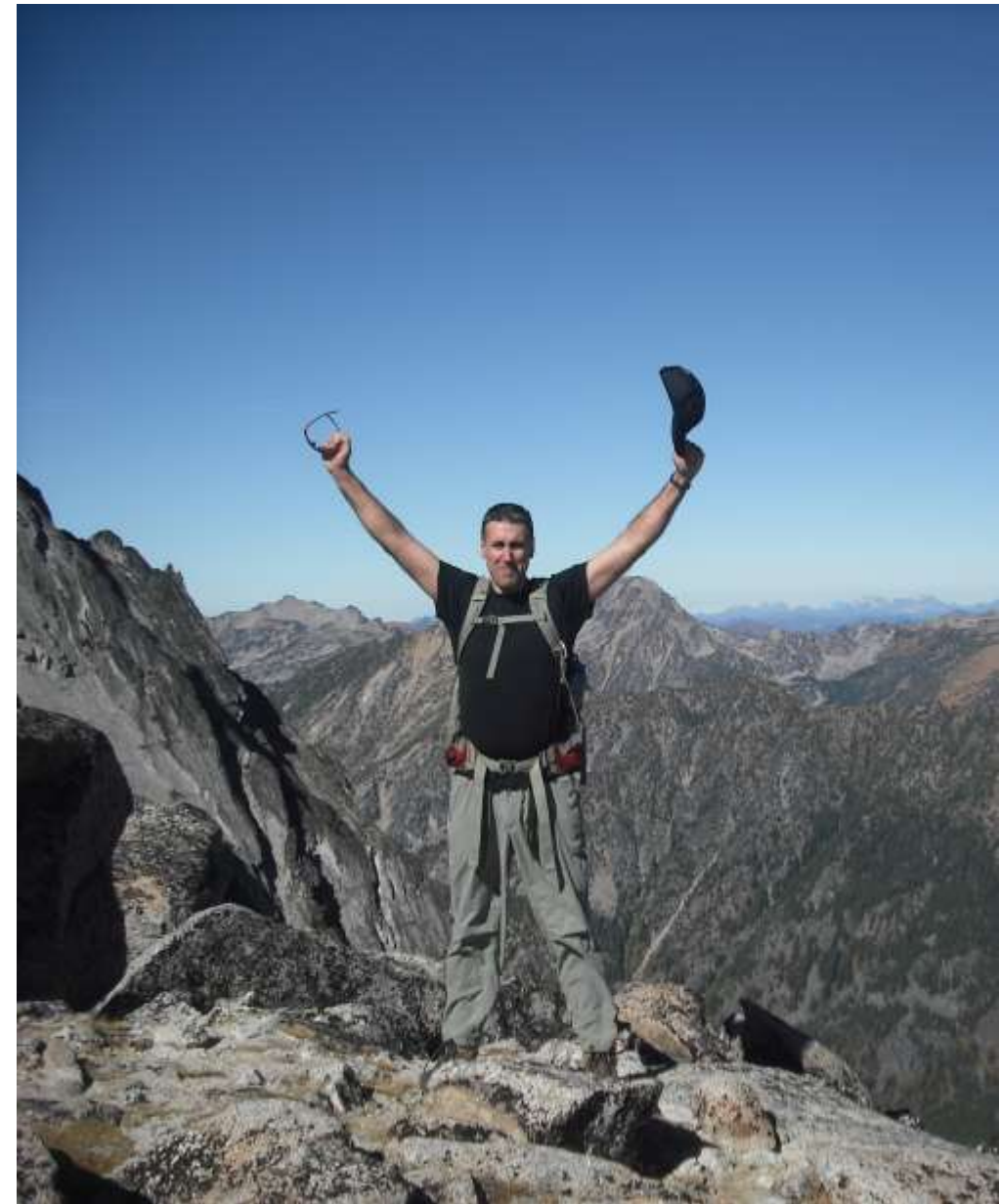


Objectives

- 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

Leadership Roles and Expectations

for Hike, Urban Walk & Backpack Leaders





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.*



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



Requirements for Leaders



- Current member, at least 18 years old
- Caring, service-focused, respectful, 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*

Requirements for Leaders (2)



Can show working competence through:

- Application (required)
- Completion of this seminar and a mentored trip with an experienced leader (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



Legal Considerations

- Even as volunteers, we have a legal **DUTY OF CARE** to follow the **STANDARD OF PRACTICE** to keep participants safe and deliver what we promise - that is, to do what a reasonable person or program would do under similar circumstances.
- ***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...

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.***

A wide-angle photograph of a mountain valley. In the foreground, two hikers are seen from behind, walking across a field of dry, golden-brown grass. The hiker on the left wears a red jacket and a backpack, while the hiker on the right wears a blue jacket and a backpack. In the middle ground, a small, dark blue lake is nestled in a rocky basin. The surrounding mountains are rugged and covered in patches of snow and ice, with some green vegetation visible on the lower slopes. The sky is overcast with grey clouds.

Running a Trip

Foothills Hike, Urban Walk & Backpack Leaders

Thursday, April 4, 2024

Foothills Branch

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.

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 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.

Mountaineer's Hike and Backpack Ratings



Difficulty (Route)

Easy (E)	Up to 8 mi. RT with <1,200 ft elevation gain
Moderate	Up to 12 mi. RT or 1,200 – 2,500 ft elevation gain
Strenuous (S)	Up to 14 mi. RT or 2,500 – 3,500 ft elevation gain
Very Strenuous (VS)	Over 14 miles RT or over 3,500 ft elevation gain

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

Leader Rating

For beginners	Average pace <1 mph- no technical challenges or specific skills required.
Easy	Average pace 1-1.5 mph - no technical challenges or specific skills required.
Moderate	Average pace of 1.5-2 mph <i>OR</i> some route challenges <i>OR</i> an easy route with an overnight pack.
Challenging	Average pace >2 mph <i>OR</i> significant route challenges/specific skills required <i>OR</i> a moderate route with an overnight pack.

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.



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!

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.

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 and the badges they have earned, 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.

Before the trip: Communicate your Goals, Expectations and Style!



Essential for creating a compatible group!

1. What are your goals for the trip?

- *How you define a successful outcome*

2. What are your expectations for group skills, preparation and behavior?

3. What is your trip style?

- *The ways you like to operate on your trips*
- *Describes the culture you want to promote on your trip*

Share these statements with potential participants before approving them to join your trip, to identify potential incompatibilities and make your expectations clear.

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?*

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?*

Before and During The Trip (Cont'd)



Teaching and mentoring

- *We all have skills (technical, leadership, interpersonal) that can help others in the group grow*
- *Part of the strength of the Mountaineers community is the opportunity to share knowledge/experience and mentor each other along the way.*
 - *Build teaching and mentoring opportunities deliberately into your trip plans! Give everyone an opportunity to be a part of it*
 - *Value everyone's unique perspective – don't judge or jump to conclusions based on appearances - be supportive and listen – don't condescend*

At the Trailhead: Foster a supportive group culture and relationships



- ✦ ***Be clear about the objectives and style of the trip in your trip description and pre-trip communications.***
- ✦ ***Clearly communicate your expectations about your Mountaineers group will work together (begins 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 each person's objectives, background, something unique about themselves, reasons for wanting to go on this trip – don't inadvertently create a sense of competition
- ✦ ***Explain how you'd like them to manage their pace to support each other, then reinforce with reminders and actions along the way***



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 being welcoming and treating everyone respectfully without judgment
 - By being a gatekeeper for unsupportive behavior



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.**

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.*

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!



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

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, demeaning or exclusionary 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. Let them know what behavior you observe and that it must stop.
- 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](#).

Examples of Behavioral “Red Flags” (see New Leader Resources for more)



- Overt flirting, asking someone to hang out, or just not leaving a person alone, or touching someone without their permission.
- Demeaning or exclusionary speech
 - *“I didn’t know that your people enjoyed camping outdoors!”*
 - *“Are you sure that a person like you should be doing that?”*
- *Micro-aggressions*
 - *“Wow, I didn’t think you would be so fit!” to someone who may carry extra weight.*
 - *Repeatedly ignoring a person’s preferred pronouns*
 - *“Where are you from?” to a trip participant with Asian features*
- *Repeatedly disregarding/dismissing someone’s comments or requests.*

Sometimes people make a mistake and say something uncomfortable without realizing the impact. Still, essential to let participants know promptly that hurtful and inappropriate comments aren’t acceptable.

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

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 / Red Cross First Aid-CPR for Urban Walks*

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

A group of nine hikers, including men and women of various ages, are posing for a group photo on a dirt trail. They are dressed in hiking gear, including backpacks, hats, and trekking poles. The background features a vast mountain landscape with rocky slopes, patches of snow, and distant snow-capped peaks under a clear blue sky. The hikers are arranged in two rows: seven are standing and two are kneeling in the front center.

Putting It Into Practice

Foothills Hike, Urban Walk & Backpack Leaders

Thursday, April 4, 2024

Foothills Branch

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!

Leadership Scenarios



You will move into a breakout group with 5-7 other students and one facilitator.

Each group will be presented 2 real-life leadership challenge scenarios, and discuss the considerations and what they think the leader should do. (15 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*

Wrapping Up

Board Policies

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



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



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

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



Wrap-up - Next Steps

Foothills Hike, Urban Walk & Backpack Leaders

Thursday, April 4, 2024

Foothills Branch

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



- New Leader seminar (you have just completed this step!!).
- Recent experience as a participant on 2-3 'open' 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. ***Subsidies or reimbursements are available*** for those who have led or will lead multiple trips! (50% for 3 trips led, 100% for 15 days led)
 - ***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).

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'.*
- Someone from the branch you select will contact you to let you know what additional requirements you need to meet, if any.
- Request provisional leader status from that committee, lead mentored trip
 - *The committee will set you up as a provisional leader and will help you identify an experienced, qualified Mountaineers leader to be your mentor.*
- With favorable evaluation, committee will grant you full leader standing & badge.

Next Steps



- Review all the class reference materials in New Leader Resources.
- 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.

A photograph of a marmot, likely a yellow-bellied marmot, sitting in a lush mountain meadow. The marmot has dark grey fur with a white patch on its face. It is surrounded by various green plants and flowers. In the background, there are blue-toned mountains under a clear sky. The word "QUESTIONS?" is written in large, white, bold, sans-serif capital letters across the center of the image.

QUESTIONS?