


New Hike-Backpack Leader Workshop

Sponsored by the Foothills Branch Hiking-Backpacking Committee

The session will begin at 6:15PM. Please mute your audio and turn off your video when you join.

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 & 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.
- 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 at least 2-3 Mountaineers hikes/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'*
 - *Mountain 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 (e.g. Red Cross first-aid, Wilderness First Aid, Staying Found, Wilderness Navigation, etc.)

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
- Communicate the hazards in writing to participants before the trip and make sure they have signed and understand the waiver
- Ensure that your participants are prepared, capable, and understand their responsibility as a responsible group member
- Review the hazards in a safety briefing before you set out, and along the way
- Operate within Mountaineers 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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"Hike" Definition



- Club-sponsored walking trips > 2 miles
- Restricted to trails/roads (maintained or unmaintained) with some exceptions:
 - Snow OK unless potential for uncontrolled slide
 - Off-trail OK unless unreasonably hazardous terrain
 - Depends on the skills of each particular group
- Party size:
 - Minimum party size is 3 (safety)
 - Maximum party size is 12 (agency rules) unless lower limits apply.

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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 Checklist




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

Review the document 'Leader Checklists' at the class link and be familiar with the expectations at each stage. We will cover a subset briefly here.

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Before the Trip (2 -3 weeks)



- Choose a safe destination given the conditions
- Post the hike on the website, with clear and concise description of the route, difficulty rating, pace, hazards, physical and gear requirements
 - Essential for participant self-screening and preparedness
 - Include some highlights!

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Before the Trip (3 – 7 days)



- Check the weather forecast, road and trail reports – adjust destination or gear and skill needs; change destination if needed
- Send out advance email(s) to confirm meeting time & place, hazards and demands of the trip, review the route (and highlights), re-enforce essential gear requirements and expectations around Covid-19 safety

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Covid-19 Phase-2 Pre-Trip Leader Expectations



- No more than 8 people in the group (including leaders)
- Must wear masks and maintain physical distance on the trail and at camps
 - Ensure that everyone has a mask and is pulling it up whenever they pass closer than 6 feet from anyone
 - Watch and remind group members to stay 6 feet or more apart
 - Avoid trails that are too busy to achieve physical distance when passing
 - If backpacking, room for all tents to be 6' apart or more
- Reinforce no gear sharing except within household or pod
- Trips requiring shuttles between trailheads?
 - ➔ At leader discretion but should be short and should have enough vehicles for people to spread out. Masks, windows open, sanitize surfaces.

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Covid-19 Phase-2 Pre-Trip Leader Expectations



- Be prepared with a game plan in case someone comes down with Covid-19 symptoms during your trip
 - *End the trip and return home safely. Unless the sick participant is so feverish they are incapacitated, this is NOT a medical emergency, so avoid adding risk to your situation.*
 - *Support the sick participant just as you would in any situation where a participant wasn't feeling well. Wear appropriate PPE.*
 - *Have extra gloves and face coverings so that others can help the sick participant without fear of exposure.*
 - *Notify the person's emergency contact person and Mountaineers staff, who will handle any other communications.*

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Covid-19 Phase-2 Participant Expectations



- If you have symptoms of Covid-19 or have interacted with someone who has symptoms, need to stay home.
- Recommending against carpooling but this is each individual's decision. The group needs to meet at the trailhead.
- Everyone needs to bring their own gear – no gear sharing
- Physical distancing is required on the trail, at breaks and at camp
- Everyone must have a face covering ready to pull up whenever they must come within 6 feet of another person
 - *No face covering – can't come on the trip*
- Be diligent about hand washing/sanitizing

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The Covid-19 Code of Conduct



Administered automatically when trip is posted or when participant signs up

Participants:

- Certify that they do not have symptoms and have not been exposed to someone with symptoms
- Agree to adhere to The Mountaineers guidelines for participation during COVID-19 and accept the additional risk of group recreation during a global pandemic

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The Covid-19 Code of Conduct (continued)



Leaders:

- Are expected to send participants home if they:
 - Do not have a cloth face covering; Do not have hand sanitizer or biodegradable soap; Do not have adequate personal gear for the activity; or are refusing to comply with Mountaineers guidance
- Are expected to model Mountaineers guidance during their trips.
- Are expected to structure their trips in a way that supports Mountaineers guidance, including:
 - Building in time for sanitation and personal hygiene
 - Managing space for physical distancing
 - Stopping the activity if the situation prevents adherence to Mountaineers guidance

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Leader Responsibilities: Screening Applicants



Ensure that your participants will be safe and successful and have fun on your planned activity.

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*

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Leader Responsibilities: Screening Applicants



Don't hide from this - It has a big effect on trip success and safety!

- **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.
- Decide based on relevant facts, not demographics or hearsay.
 - Activity leaders **may not** require participants to provide proof that they are eligible for the activity beyond requiring agreement to the COVID-19 Code of Conduct.
 - Activity leaders **may not** disallow participation based on occupation or demographic information.

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At The Trailhead



• **Introductions – begin to encourage building of relationships among the group members!**

- Talk about how Mountaineers groups work
 - **SUCCESS = having fun together, getting everyone back safely - may not include getting to the destination if it's not safe for everyone!**
- Break the ice by sharing special skills, each person's objectives or reason for wanting to go on this hike
- Remind everyone of the Covid-19 expectations: mask, physical distancing, hand washing/sanitizer



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At The Trailhead (continued)



- Ask for a volunteer to be first-aid leader and sweep
 - Trip leader and first-aid leader should be different so you can manage a crisis.
 - Sweep is your eyes and ears at the back of the group.
 - Explain what each person's responsibilities are. If you trade off, confirm who will take over.
- Review the map – route, junctions, hazards, rest stops, water sources, lunch, camp, turnaround time - **how to get back to the trailhead if they get lost!!**



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At The Trailhead (Cont'd)



- Communicate explicit expectations about:
 - How you intend to manage the pace, when and where to wait for the group to catch up
 - Procedure for 'bio breaks'
 - **Safety first! Will turn around if you judge conditions to be unsafe.**
- Encourage communication of safety concerns, any illness or injury as you go along – why this is so important
- Begin to foster an atmosphere of emotional safety...
 - By you as the leader being humble and open with everyone
 - *By reminding everyone to be respectful of others and to avoid potentially offensive topics, jokes etc. during a trip. Caring and consideration are the watchwords!*

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.*
 - *Participants should wait for the leader at all junctions, significant stream crossings or hazards.*
 - *Watch and remind people if needed about physical distancing and use of face coverings*
- 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.**
 - *Be thoughtful and kind! If they feel humiliated or left out, this may be the last Mountaineers activity they join!*

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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.*
 - Listen and discuss options, but also be decisive and confident. Explain your rationale and relate it to the safety of the group.
 - Draw out the quiet people. Watch for the 'herd mentality'.
 - "Majority rule" or consensus isn't appropriate for all situations.

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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A Few Leadership Basics



Good Leaders Create Good Participants

- Healthy Communication & Clear Expectation Setting
- Expedition Behavior: NOLS concept of group oriented behavior
 - Care for the group & care for yourself – model kindness, caring and respect
 - “How can I support you?”
- Inclusive Decision Making
 - Engaged participants “own” the trip success
- Build camaraderie and an atmosphere of mutual caring within your group!



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Making decisions



- Some decisions must be made quickly and/or cannot be democratic (safety, harassment, illegal behavior)
- When there really is flexibility for group engagement in a decision, it can bring the group together and add ownership!
 - Start with brainstorming options – leader can summarize the options, then take a non-binding “advisory” survey of the group
 - Give participants a chance to discuss and advocate for their positions
 - Then take a final vote and ask everyone to support it

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Dealing with a difficult participant and/or unacceptable behavior



- Don’t put it off!
- De-escalate - don’t be aggressive or confrontational
- Deal in private – don’t humiliate someone in front of others
- Explain what you observe and why it concerns you – how could it impact the trip and/or the group – what changes need to happen
- Seek to understand their concerns/point of view – active listening
- Ask them to help you resolve the situation

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Dealing with a difficult participant and/or unacceptable behavior



- Stay calm and manage your emotional state
- If you can accommodate safely, do so
- *If their behavior 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 important!
 - Harassment, objectionable language, inappropriate conversations or touching are unacceptable on a Mountaineers activity.

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Addressing Problem Behavior



The Mountaineers prefers to stop all problem behavior before it escalates to more severe acts like harassment or destroys a member's mental well being and enjoyment in the club.

- We encourage members to tell an offending party in real time when their conduct is not appropriate, and ask them to stop. The leader can often facilitate this.
- If a member is not comfortable doing this, or has tried and the offending behavior has continued, then the member can report the offending behavior to staff using the online Behavior Complaint form. A discreet investigation and response will follow.
- Group leaders who know about or receive reports of offending behavior are asked to promptly notify staff so action can be taken.

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In Case of Emergency – The “Seven Steps”



- **Step 1.** Take Charge of the Situation and the group
- **Step 2.** Approach the Patient Safely and Complete Primary Assessment
- **Step 3.** Perform Urgent First Aid
- **Step 4.** Protect the Patient.
- **Step 5.** Check for Other Injuries
- **Step 6.** Plan What to Do
- **Step 7.** Carry Out the Plan

* Complete incident report when you close your trip

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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 for leaders who commit to leading at least 3 trips in a year*

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Leader Responsibilities: Ten Essentials



- Carry and know how to use all of the essentials – and some extras of especially critical items.
- Emphasize critical items in description and pre-trip communications – **and check for them before you leave the meeting place.**
- Not required to check everyone for all ten essentials before every trip.
 - Teach and lead by example, but don't be more rigid than the circumstances require for safety. Leaders have the leeway to specify different gear requirements based on the demands of the trip.
 - *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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Leader Responsibilities: Carpooling



- Mountaineers insurance does not allow leaders or staff to *assign or require* carpools. (and during the Covid era we recommend that no one carpool outside their household or "pod".)
- In "normal times":
 - 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 & Pets



- Youth:
 - Special requirements for leaders and supervision for anyone under 18 (applies even with their parents on the trip)
 - <https://www.mountaineers.org/youth/volunteer-with-youth>

• Hikes with dogs:

- Establish in advance as part of trip posting – don't 'spring' it on the other participants after they've registered
- 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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Leader Responsibilities: Privacy



Mountaineers members can choose to make their profile data private

➢The data of a person with a private profile *cannot be shared with other members.*

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

- Leaders may extract and use participant profile data even when private, for planning and safety purposes relative to their trip or seminar.
- Ask for permission before sharing even email addresses with other participants.

- [Privacy policy explained](#)

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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 4-6 other students and one facilitator.

First each group will first confront a real-life leadership challenge, and discuss the considerations, what the leader should do. (15 mins)

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

Then each group will do two role-plays of a leader evaluating the capability of a prospective participant for a planned hike. (5 minutes each followed by a debrief)

- *We'll need volunteers for two pairs of leader and participant, plus a note taker*

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Next Steps



- Review all the class reference materials
- Submit application form – I'll send this to you after this class.
- Review instructions for posting an activity on the Mountaineers website and managing an activity roster – under "Volunteer" → "Schedule and Manage".
- Organize, post and lead a Mountaineers hike or backpack with an experienced Mountaineers leader as a mentor.
 - *Email your hike or backpack committee chair to arrange for a mentor.*
 - *You will be the primary leader in all aspects – your mentor is there before, during and after the trip to answer questions and offer suggestions.*
 - *You can ask for additional mentored trips or co leaders at any time*

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Next Steps (Cont'd)



- Leaders must be approved on the leader roster for a sponsoring hike/backpack committee to post and lead a trip.
 - You can lead for any Mountaineers branch, regardless of your 'home branch'.
 - The branch hiking committee you select must approve your application and qualifications and put you on their roster.

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Next Steps (Cont'd)



- ***New Mountaineers member with mostly outside experience?*** you'll be asked to participate in a few Mountaineers hikes or backpacks before becoming a Mountaineers hike or BP leader.
- ***Want to lead Mountaineers backpacking trips?*** We recommend you lead some Mountaineers hikes first, complete the application with our backpacking background, and then lead a mentored backpack trip.
- ***Already a Mountaineers climb or scramble leader?*** We recommend that you lead your first hike or backpack with a mentor because of the very different pool of people and challenges you may encounter.

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