Hike and Backpack Leaders Workshop
Seattle Hiking Committee
Objectives

▪ Define “hike” according to club standards and explain the hike rating system.
▪ Describe the roles, responsibilities and expectations of a hike leader for the Mountaineers.
▪ Know the kinds of trips you want to lead, and how to attract participants who have the same interests and capabilities.
▪ Be prepared and confident to handle common challenges you will encounter leading groups on the trail.
▪ List a hike on the Mountaineers website.
Agenda

- Foundational Content – presentation
- Roles and Responsibilities of Hike Leaders - small group work, discussion

Break

- Hike leader scenarios – small group work discussion
- Posting a hike on the website - demo
- Next steps
Why become a Mountaineers Hike leader?

- Choose your own destinations, hike dates and types-pace of trips.
- Teach and assist less experienced people to experience the wilderness safely...*pay it forward*.
- Learn how to lead people and effectively handle a range of challenging situations--skills that carry over into other aspects of life.
- Become part of a community – gain new lifelong friends.
- Leadership: 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.
What is a Mountaineers “hike”?

- **Club-sponsored** walking trips > 2 miles (any committee sponsoring a hike - Naturalists, Photography, etc.)

- **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 (Seattle);
  - Maximum party size is 12 (agency rules), unless other party limits apply.

- If posted on the website and led within these rules, the Mountaineers provides you with liability protection (given that you are not negligent)
## Mountaineers Difficulty Ratings

### Difficulty (Route)

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual</td>
<td>Up to 4 miles and up to 600’ elevation gain</td>
</tr>
<tr>
<td>Easy (E)</td>
<td>Up to 8 mi. RT and up to 1,200 ft elevation gain</td>
</tr>
<tr>
<td>Moderate</td>
<td>Up to 12 mi. RT and up to 2,500 ft elevation gain</td>
</tr>
<tr>
<td>Strenuous (S)</td>
<td>Up to 14 mi. RT or 2,500 – 3,500 ft elevation gain</td>
</tr>
<tr>
<td>Very Strenuous (VS)</td>
<td>Over 14 miles RT or over 3,500 ft elevation gain</td>
</tr>
</tbody>
</table>

### Pace (How leader plans to cover the route)

<table>
<thead>
<tr>
<th>Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Casual</td>
<td>Average pace &lt;1mph &amp; no technical challenges, special skills needed</td>
</tr>
<tr>
<td>Easy</td>
<td>Average pace 1 – 1.5 mph, no technical challenges, special skills</td>
</tr>
<tr>
<td>Moderate</td>
<td>1.5-2 mph average</td>
</tr>
<tr>
<td>Challenging</td>
<td>&gt;2 mph average</td>
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</tbody>
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Rate each trip 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.*
Requirements for Hike Leaders

- Current member, at least 18 years old; **At least 3 Mtneers club day hikes (non Urban hikes)**
- Caring, service-focused, respectful, empathetic, safety-oriented

**Must demonstrate working competence in:**

1. Group Leadership
2. Basic hiking skills: Including gear, ten essentials, trail and camp skills, leave no trace principles
3. Navigation: Use of map and tools to ‘stay found’
4. Mountain Safety Skills/Knowledge: Common hazards, how to recognize and avoid or mitigate them
5. First Aid and Emergency Preparedness: Basics to handle common on-trail first aid and emergency situations
6. Knowledge of Standards and Policies: Mountaineers and land management agencies

Classes soon to be required
Process to become a Hike leader

- Attend a hike leaders workshop (one-evening session – you’re at it!)
- Complete a mentored hike (non-urban) with an approved hike leader (more on this later)
- Hiking Committee will review:
  - Activity Report from mentored hike;
  - Hike mentor’s evaluation of prospective leader; and
- Hiking committee grants hike leader status if requirements are met.
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)
Legal Considerations

How do you control the risk of legal liability?

- Don’t lead until you have the basic competencies for the hike you intend to lead
- Communicate any hazards in writing to participants before the trip
- Ensure participants understand the waiver
- Ensure that your participants are prepared and capable
- Review the hazards in a safety briefing before you set out, and along the way
- Bring your participants home safely
Legal Considerations

*We can’t eliminate all risk in outdoor adventure.*

- Take all reasonable and prudent measures to manage the risk of injury.
- Respond to emergencies responsibly within your level of training.
- If an incident happens, engage Mountaineers emergency procedures immediately, and document what happened.
LEADERSHIP
ROLES AND RESPONSIBILITIES
Role of the Leader

- Plan, organize and run safe and fun activities
- Authority and accountability for the SAFE RETURN of your groups. *Getting your group back safely is your top priority!*
- Ensure that your participants are capable and prepared to succeed on the posted itinerary.
- Be a positive, responsible role model of courteous trail behavior and ‘leave no trace’
- *You are the face of the Mountaineers, a 114 year old brand. Leave your participants feeling great about their experience!*
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.
Leader Responsibilities: Carpooling

- Mountaineers legal responsibility starts at the trailhead – participants’ are responsible to get themselves there.
- Liability risks mean leaders and staff CANNOT assign or require carpools.
- Leaders CAN encourage carpooling and facilitate by sharing contact info (if authorized by hiker).
- Willing drivers are a precious resource.
  - Remind people that it’s an important courtesy to reimburse their driver. You can suggest a common reimbursement rate.
  - Tell hikers the round-trip mileage to trailhead – can include in Hello Hikers email.
Leader Responsibilities: Know basic navigation to *Stay Found*

- Review the map regularly as you go along to “read” the terrain, route and distance you’ve traveled
- Always carry a good topo map of your trail - know how to orient to north, read the scale, lines and symbols
  - Learn how to use watch, compass, altimeter with your map to figure out where you are
- DON’T RELY ON GPS ALONE. Batteries, satellite links can fail.

Check out our hands-on ‘Staying Found’ navigation class for hikers and backpackers!
In Case of Emergency

We expect our leaders to have basic skills and knowledge for how to handle basic first aid and other emergencies in the field.

- Trail Emergency Preparedness evening class and Wilderness First Aid (WFA) classes available
- If incident occurred, complete an incident report when you close your trip
Hike Leader Responsibilities: Leader Checklist

- Before the hike
- At the meeting place
- At the trailhead
- On the trail
- In case of emergency
- After the trip
Group Activity

Flip Chart Round Robin
Leader Responsibilities: Before the hike:

2-3 weeks in advance (or more if needed):

- Research trail conditions, recent trip reports to select a destination

- Identify any reservations or permits required. Make arrangements for your group or tell your group what they need to do.

- Post the hike on the website, with clear and concise description of the route, difficulty rating, pace, hazards, physical and gear requirements.
  - “Leader Permission Only” option

The detail you provide in the activity description about the demands and risks of the trip are essential to the self-screening and preparedness of your participants.
Leader Responsibilities: Before the hike (continued)

3-7 days in advance:

- Check the **weather forecast**, road and trail reports – adjust destination or gear and skill needs; change destination if needed
- Review the **route**, ensure you have up to date topo map
- Send out ‘Hello Hiker’ email to confirm meeting time & place, hazards and demands of the trip, gear requirements, facilitate carpooling
  - Emphasize critical items in description and pre-trip communications
  - Consider carrying extras of especially critical items.
Leader Responsibilities: Before the hike (cont.): **Screening Participants**

*Most problems on hikes or backpacks reflect poor match of participant capabilities/interests with the planned activity.*

- Check roster – screen participants to be sure that everyone is conditioned and experienced to be safe and have fun on your hike at the planned pace
- Set expectations with clear activity descriptions and pre-trip communications - help participants self-screen.
Leader Responsibilities:
Before the hike (cont.): Screening Participants

- If your trip requires certain skills and/or conditioning, and you don’t know a person on your roster:
  - Check their activity and course history on the website
  - If you need more information, set up a phone call. Ask detailed but considerate questions to ensure that they are capable:
    - 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 hike
    - Be caring and respectful — explain that you want to be sure everyone will have fun and be successful. Suggest an alternate activity if yours isn’t a fit
    - It can be awkward, but can have big effect on trip success and safety!
Leader Responsibilities:
Before the hike (cont.): **Screening Participants**

- Be as inclusive as possible. Can you find ways to accommodate a slower pace within your schedule? (Co-leader?)
- Make a decision based on relevant facts, not demographics or hearsay.
- If a person never responds, you have the right to turn them down or cancel them from your roster.
Leader Responsibilities:
At the meeting place (P&R)

- Arrive at meeting place 10 minutes early
- Have trip roster (hard copy), map, weather reports handy for reference. Keep cell phone turned on
- Introduce yourself as leader, check off names of hikers on roster.
- Identify no-shows for reporting on Activity Report
- Be sure that everyone has directions to the same trailhead, and the right permits!
- Equipment check
Leader Responsibilities:
At the meeting place (P&R)

- It’s 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.
  
  *If someone shows up without a piece of critical gear, see if someone else can share or decide if it’s truly essential before leaving someone behind. That could be the last Mountaineers trip they choose to take. Be a teacher – help them succeed.*
Leader Responsibilities:
At the Trailhead (1)

- Introductions and ice-breaker
- Emphasize that Mountaineers travel as a group.
- Ask for a volunteer to be first-aid leader, sweep – explain the role of each of these
- Ask participants to inform Wilderness First Aid leader of relevant medical/health conditions in private
- Describe the hike and trail conditions, potential problems/challenges, pace, side trails, scenery, etc.
- Review the map – route, junctions, rest stops, water sources, lunch, turnaround time
Leader Responsibilities: At the Trailhead (2)

- Establish trip expectations: be explicit about:
  - How you intend to keep group together (i.e., wait at intersections, stream crossings); party separation procedure; front guard; sweep.
  - Manage pacing dynamics.
  - Safety first! *Will turn around if you judge conditions to be unsafe.*

- Remind drivers to post any necessary passes; remove valuables from view

- Encourage communication of safety concerns, needs, any illness or injury as you go along – why this is so important to everyone’s safety
Leader Responsibilities: On the Trail

- Plan to stop within 10-20 minutes for a clothing adjustment and pacing check.
- Don’t let the group get too spread out.
- Check-in with people to see how they are doing.
- Stay vigilant for participant, weather, route issues.
- 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.
  - YOU are responsible for safety. Don’t back away from doing the safe thing just because someone pushes hard or gets frustrated. Bring it back to everyone’s responsibility to the whole group.
  - ALWAYS require that all participants re-group at all junctions and significant stream crossings or hazards.
Leader Responsibilities: On the Trail (continued)

- At rest stops allow slower hikers to rest after catching up with the faster ones

- Splitting the group - Avoid doing so if possible.
  - If an individual insists on leaving the group have them sign out in front of witnesses by initialing name on trip roster with date & time

- If conditions change or the route proves more difficult than the weakest member can complete safely, find a safer alternative or turn around the group.
  - Avoid ‘mission creep’. Lead the trip you posted.
  - Gather the facts, listen, discuss alternatives, but also be decisive and confident. Explain your rationale relate it to the safety of the group.
  - Draw out the quiet people. Watch for the ‘herd mentality’
Leader Responsibilities: After the Hike

- Ensure everybody has returned to trailhead
- Remind passengers of carpool driver reimbursement rates
- If dinner/food stop planned ensure all have directions (and ride back to P&R!)
- Make sure all cars start before leaving
- Close the activity online within 1 week
  - Indicate no-shows and late cancellations
  - Report all accidents or injuries, even minor ones
What would you do if…
Leadership Decision Making Scenarios

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

- Next we’ll explore in greater depth how to respond to some common ‘judgment’ situations
- Break into 4 groups of 3-5 people
- You will be given a scenario – discuss, answer the questions, be ready for informal report out to the group
- Listen, consider and take notes from the other groups’ report outs
Leadership is not a science to be picked up in a book or course, but an art to be learned over time. -- John Graham
Next steps to become a trip leader

- Email Seattle Hiking Committee indicating your interest in proceeding and the name of your mentor.
  - You will be granted temporary leader status which enables you to list a hike on the Mountaineers website.
    - Hiking Committee can help identify a mentor
- Review all the class reference materials.
- Select a hike to lead - research the hike
- Contact mentor directly; review what is expected before, during, & after the hike
- Post the hike on the website
- Lead the hike
Next steps to become a trip leader (cont.)

After your mentored trip:

- Close the activity on the Mountaineers website within two-days after completing the hike.
- Email the Hiking Committee at SeattleHikeLeader@gmail.com with the date/destination of your mentored hike that you completed, name of your mentor and request to become an approved regular hike leader.
- Have your mentor contact the Seattle Hiking Committee regarding their observations and recommendations from the mentored hike at SeattleHikeLeader@gmail.com.
Next steps to become a hike leader (continued)

- Your chosen hiking committee will review your mentor’s evaluation from the mentored hike and grant hike leader status if requirements are met.
  - Select a hiking committee near your home if you want to participate in committee activities, events and local leader training; otherwise choose the committee that runs the activities you most identify with.
  - Can request additional mentoring or post hikes with a co-leader if you wish.
How to Post a Trip

- Refer to Volunteer – Leader Resources on the club website for step-by-step and video tutorial.

How to Post a Trip online
On the rare occasion…

- Emergency Preparedness
- Serious Accidents
- Lost Hiker
Leader Responsibilities: Emergency Preparedness

Before the trip:

- Leave your itinerary with a trusted friend or family member, along with when you’ll be back and what to do if you don’t return by that time.
- Bring emergency contact numbers for your participants
- Carry emergency procedures with you; adapt based on the particular hazards of a given trip
- Bring along an accident report form and pencil
- Check your first aid kit – be sure it’s stocked
- Plan out your emergency communication options
Leader Responsibilities: Emergency Preparedness

Scene Management:

1. STOP. Stay calm, get the group calm.

2. Protect yourself and your group members. *Allow no new victims!!!*

3. Re-establish primary leader and first aid leader

4. Survey the scene (*What happened? Remaining hazards or new ones? Other injuries/issues?*)

5. Give everyone something to do.
Leader Responsibilities: Emergency Preparedness

Provide patient care / First Aid *within your level of training*!

1. Get consent to help the patient. (unconscious=consent)
2. Use protective barriers (gloves, breathing device)
3. Check the **ABCs** and address life-threatening problems
   - **Airway**: Is the patient’s airway clear?
   - **Breathing**: Is the patient breathing?
   - **Circulation**: Is there life-threatening bleeding?
4. Do a secondary survey and record patient information (use *Accident Report Form*)
5. Stabilize patient and scene *before* sending for help
Leader Responsibilities: Emergency Preparedness

Plan Your Evacuation

- How are you going to safely get help?
  - Consider urgency, distance, terrain, group strength, route, communication options.
- Write down and share the plan with everyone.
- Don’t let anyone leave unless you’ve assigned them to go get help.
  - Evacuating a person can take multiple people!
- Never leave someone alone or send someone out alone.

After any rescue is initiated, contact the Mountaineers via emergency line: 206-521-6030
Leader Responsibilities: Emergency Preparedness


Check out our “Trail Emergency Preparedness” class for hikers and backpackers!

- Also very valuable to take a Red Cross First Aid-CPR class – often held at local fire stations, inexpensive
- To go further, the Mountaineers offer multiple sessions of the 16-hour ‘Wilderness First Aid’ class

Report any accident or important safety incident in the post-trip safety report – encourage participants to provide feedback.
Leader Responsibilities: Lost Hiker?

Keep group in view and count noses regularly to prevent lost hikers!! But if you lose someone:

- Determine when and where hiker was last seen.
- Plan a search – review where searchers will go on the map (everyone must have a map!)
- Don’t send anybody out alone; nobody should be waiting alone while group searches. People should bring their pack and gear.
- Designate a time and place to reassemble all search groups
- If hiker is not found, contact local search and rescue via 911.
QUESTIONS?
Books on Leadership

- Outdoor Leadership: Technique, Common Sense & Self-Confidence – John Graham