Posting a new activity on the Mountaineers website

In preparation for posting a new hike or backpack activity, first review the detailed instructions at https://www.mountaineers.org/volunteers/schedule-an-activity.
Input your trip as early as possible to give yourself and your participants plenty of lead time, particularly for backpacks. (We recommend getting backpack postings up on the site at least six weeks in advance of your planned trip – two months if you need to have a new Route-Place set up (see appendix).

Step 1: log onto the Mountaineers website, go to Volunteers, and choose Schedule an Activity. A page will open with detailed step by step instructions for how to schedule a new hike or backpack activity and helpful links.
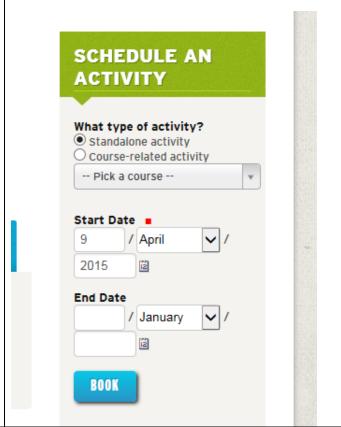
When you click on 'Schedule a New Activity' button, you will be taken to the search page for Routes-Places.

Step 2: Choose the Route-Place – the name of the trail system/destination your trip will follow or endpoint that it is heading to.
On the filter bar to the left, click the little boxes for Day Hike, Backpack and Scramble to narrow down the range of options (you may use a day-hike route or a scramble route for a backpack, and vice versa). Page down through the alphabetic list to find the route-place you want. It is very important that you look for possible alternative names. When you find it on the list, click on it and it will open a page with the default details of the route/place. If you can't find it, you may need to request a new route/place** (see appendix).

**Schedule the Activity(new route/place). *If you requested a new route/place, you will receive an email from staff (probably from info@mountaineers.org) when your Route-Place is available to select. They may give you a link so that you can click and go to your new Route-Place directly. If not, go to EXPLORE, FIND ROUTES & PLACES, and click the little boxes on the filter bar to the left for Day Hike, Backpack and Scramble to narrow down the range of options. Then scroll down to find and click on the route-place you want your activity to visit.*

On the right of the page you will see a green 'Schedule an Activity' box. Below it, unless you are posting a hike for CHS or for one of the Scrambling or Climbing courses (out of scope for these instructions), click Stand Alone Activity and then select beginning and ending dates for your trip. (If travel will require participants to leave the day before or get back the day after, include the travel days in your date range.)

Then click 'Book'.

SCHEDULE AN ACTIVITY

What type of activity?
- ⦿ Standalone activity
- ○ Course-related activity

-- Pick a course --

Start Date ▪

9 / April / 2015

End Date

/ January /

BOOK

Step 3: Choose templates, sponsor committee and drop-list items.

The next page will ask that you select an 'Activity Template' (choose Day Hike or Backpacking) and a Sponsoring Committee (choose Seattle Hiking or Foothills, or whichever committee for which you are listed as a leader on the roster).

Click 'Select'.   A form will come up where you will describe your activity.

The 'Activity Type' will include your primary activity type from the Route-Place ("Day Hiking" or 'Backpacking') but you can also add from the drop-down list any other activity types that may be included in the official trip. Your activity will then come up when participants search using those activity types as filters.

The 'Summary' box should be just one or two sentences that capture the mileage and elevation gain, number of days difficulty/strenuousness, and a few notes on what will be special about the trip.

The 'Meeting Place/Time' can be specific or 'to be determined'. It is handy to put a link to detailed directions to the meeting place and/or trailhead here.

Choose the leader rating from the drop-down choices that best integrates the pace, daily miles, elevation gain and terrain challenges you expect.

Choose the audiences from the drop-down list that will be welcome on your trip. {If you are not a Qualified Youth Leader and you don't have a co-leader who is a QYL, you cannot include Families or Youth under activity audiences. The process to become a QYL is quite straightforward and we encourage any hike or backpack leader to consider it – to find out more go to *http://www.mountaineers.org/forms/working_with_youth_faq.pdf.*}

Step 4: Add Leaders Notes to include a wide variety of information about the trip.   Leaders Notes content could include:

▪ Summary of what will be special about the trip: views, wildflowers, wildlife, berries, fall color, etc. – what you like the best about the route. Can send link to a hiking guide at www.wta.org, or other online description, if available.

▪ Daily and total elevation gains and mileage; planned pace in mph that you hope to maintain while walking; expected locations of camps and any side trips

▪ Expected weather (link to forecast at http://forecast.weather.gov/, drilled down to the location of the trip); note that trip could be cancelled or moved if weather or trail conditions are unsafe on the trip date.

▪ Likely challenges/hazards of the route at the time the trip will go (terrain, availability of water, route-finding, stream or snow crossings, lightning, bears, etc)

▪ Participant requirements (conditioning, skills, experience); note if leader permission is required to go on this trip, and what they need to do to get it.

▪ Any specific clothing and gear requirements (including 10 essentials!); leader's intentions for gear sharing.

▪ Permits that will be required; link to online site to get the needed permits.

▪ Maps that will be used; We suggest our own page about this: http://www.mountaineers.org/foothills/hiking/docs/how_to_print_usgs_maps_for_free.html

▪ Any special costs (transport, pre- or post-hike lodging or campground, permit fees, etc.) that participants will incur to go on the trip.

Most critical here are those things which describe minimum participant requirements, the planned pace, daily elevation and mileage – things that a participant will need to know to determine their interest and capability to do the trip.

If the pace will be slow to focus on photography or wildflowers, say so. If you must go far and fast to complete the route, say so. All of these details will be further clarified in pre-trip communications. Setting consistent expectations for your hikers is highly recommended.

If are not a QYL or the trip isn't appropriate for young hikers, include a note at the top of your Leaders Notes "Participants must be >18 years old." Add notes that provide info that will help hikers self-select trips that they can do and also that give more data about the hike/trail conditions area that are good for preparing for the hike.

<div style="background-color: yellow">

Leaders Notes Example:

This trip is open to club members and guests over age 18. Leader permission is required.
We will hike at a social pace (can hike and talk too) and enjoy the fall colors. From the Little Wenatchee River campground and trailhead, we'll climb the Cady Ridge trail 6.5 miles to Lake Sally Ann and the PCT.

A NW Forest Pass will be required for each vehicle (http://www.fs.usda.gov/detail/r6/passes-permits/recreation/?cid=fsbdev2_027010">.)

</div>

Select 'recommended guidebooks' from the drop down list (choose 'none' if you don't find the one you want on the list).
Verify that you are listed as the Primary leader, then click 'Continue'.

Review and edit the maximum capacity for the trip (the largest number of people you will allow, including leaders). Adjust the capacity of the leaders if you plan to add a co-leader. Click on 'Leader Permission Required' if you want to be able to approve people before they can sign up (a good idea for any backpack or strenuous hike). Then specify the dates when you want registration to open and close – for backpacks we advise closing registration a week or more in advance of your trip so that you have time to screen participants and adjust carpools.

Then skip to the bottom and click on 'Save'. Your activity will now be listed on the webpage and will open for registration at the date/time you have specified. You can also see the trip by clicking on your name at the upper right of the login page and opening 'My Activities'.

Adding a Co-Leader
To add a co-leader, once you have created the activity click on your name to the upper right and select 'My Activities', then open the particular activity where you want to add the co-leader. On the orange admin bar at the top, choose 'Roster'. If the co-leader is already on the roster, click on 'Edit/Cancel' and choose 'Co-Leader' from the Activity Role drop-down list. Then SAVE. First be sure that the maximum participant number in the activity setup is correct for leaders & participants. Then open the roster and click on 'Add Person to Roster'. Search for the co-leader's name, then specify 'Co Leader' as their Activity Role. Then SAVE.

Screening Participants

There is an optional website tool for allowing you to screen participants, it is the 'Leader Permission Only' check box, which you can select when you create a new activity. This is completely at your discretion. When you specify 'Leader Permission Only, an interested member must email you to request your permission to register for a trip. Leader Permission is more important when you need your hikers to have an advanced level of conditioning and/or technical skills/experience. Note that a person can put themselves on your roster by checking a box that says they have your permission even if you haven't granted it; if someone does this, it is acceptable for you to cancel them from the roster until you've connected with them to verify their qualifications for the activity. Just be courteous and explain why it's important for them to get permission first.

You can view courses/ activities that your hikers have already completed or are enrolled. To do this, after you log in click on the magnifying glass symbol to the top right of the main page, and type the name of the person you want to get information about, then SEARCH. A page will come up with a list of names having some connection to your search terms. Click on the name you want. Their account page will come up. Click on 'My Profile' to the left to see the branch and committees they belong to and the badges they have earned. Click on 'My Activities' to the left to see the activities they have scheduled and completed. Click on 'My Courses' to see the courses they have scheduled and completed. This information will also tell you how many activities they have signed up for and then canceled out of.

Trip Roster – Access, Manage, Download Participant Info

The 'roster' is the list of people who have registered or are wait-listed for a particular activity. As the activity leader you have control over who is on your roster up to the maximum number defined in your activity posting. The roster is also the source of detailed waiver, background and contact information for the people signed up for your trip.

To access your roster, log in to the website, click on your name and choose 'My Activities'. Then click on the activity you want to check the roster for. That will open the registration page for that activity. The leader of the trip (and any designated Committee Admins) will see an orange Admin bar at the top of that page with three available commands: "View", "Edit" and "Roster". When the page opens you are already on the "View" screen.

Click on "Edit" to go back to the form where you can modify any of the details of your trip. You can change the dates of your trip and even the destination Route-Place from the "Edit" page by going to the top of the form and clicking on "Route-Place" in the light blue bar. Remember to SAVE your changes.

Click on "Roster" to manage the list of people going on the trip, to add or cancel someone, to download participant information or to cancel the trip. The Roster page is organized into a list of people who are Registered, those who are Waitlisted and those who have Cancelled. You can click on any name to pull up their email address. If you click on 'Edit or Cancel' next to a particular name you can go in and change their status (say, move them to the waitlist or cancel them off the roster) and you can also add confidential participant notes here after the trip as well as information about any volunteer time they contributed to the activity. From this page you can click on any set of the names and send an email to those people – a box will open that allows you to type a standard message. You are not able to attach any links to an email using this function, and the email will go to those people from 'The Mountaineers' with none of the "TO" addresses showing. Look below for another more flexible way to send emails to your participants!

At the upper left of the Roster page are two green boxes that allow you to Download Roster or Add Person to Roster. The 'Add Person' button takes you to a self-explanatory screen where you enter the person's name that you want to add. The 'Download Roster' button brings up a table of information about all your participants including waitlisted and cancelled ones. To the upper right on this page are three buttons, 'Copy', 'Excel' and 'Print'. You can use these

buttons to copy your roster info table into excel, save it directly to an excel file, or print it (print formats may be a bit funky).

From the resulting excel file, you can highlight the entries in the table column of email addresses and paste them into the TO field of your email program, thereby allowing you to email any or all of your participants with attachments, links and other rich text options.

How to Relocate, Reschedule or Cancel your trip

To relocate your trip to a new destination or reschedule to a different date, log in, click on your name to the upper right and select 'My Activities', open the activity that needs to be changed. On the orange admin bar at the top, choose 'Edit'. Then, choose 'Route-Place' on the lilac colored bar toward the top of the form.   To change the destination of your trip, click on 'Change Route/Place' just above the original Route-Place title. A simple form will open where you can search for a new Route-Place using keywords and a date range (the date range is used to assure that two trips aren't going to the same place on the same dates).   Select the new Route-Place and SAVE.

To change the date of your trip, from the Edit form choose 'Route-Place' on the lilac colored bar at the top, and page down to modify the start and end dates. Then SAVE. Your participants will receive an automated email notifying them of the change (but you should communicate such changes personally, preferably before they find out in the automated email from the club).

To cancel any activity, log in, click on your name to the upper right and select 'My Activities', and open the activity that needs to be changed. On the orange admin bar at the top, choose 'Roster'. Scroll down the page to 'Set Activity Result' and select 'Cancelled' from the drop-down box. Then SAVE. An automated message will go out to all your participants notifying them that the activity was cancelled.   It is an important courtesy for you to communicate your situation and the need to cancel personally in an email before they find out about it in an automated email.

Post-Trip Activity Closing and Reporting

After each trip, log in, click on your name to the upper right and select 'My Activities'. On the lower section of the page that comes up you will see your activity history. Click on the activity just completed that you want to close, which will open the activity description. Go to the

orange bar near the top of the page and click on 'Roster'. A roster-detail and activity closing page will come up.

First check the roster and click on 'edit or cancel', then change the Activity Registration Status of anyone who canceled or didn't show up to 'cancelled'. Scroll down to the Confidential Participant Notes to add any confidential notes that the committee or other leaders might need to know, such as 'no-call-no-show' or 'should not register for fast-paced trips' or 'may need coaching on pack weight'. SAVE.

Then, on the main roster page, scroll down below all the names to 'Set Activity Result' and select the Trip Results from the drop-down box. If you got everyone back safely you can choose 'Successful' even if you didn't make it to the initial target summit or endpoint. This will change the Trip Result for all your participants to that common value. If individual participants were not successful, you have the option after you set the overall Activity Result to go back up to 'edit or cancel' and enter a different Participant Result for individual people on the roster.

An email address is provided to report any injuries or accidents that occurred on your trip to the Safety Committee. This is requested anytime that a person has to be evacuated or goes to the doctor/hospital, as well as when significant first aid needs to be administered.

Finally click on the 'Close Activity' button at the bottom. This will credit you and your participants for a successful outing. You will not be able to modify your participants or add notes after closing.

Trip Reporting

Detailed trip reports can be extremely helpful for future leaders on the same route. Trip reports provide very valuable info about hazards, camps, water, trail reroutes, road conditions, and many other things that may not otherwise be available. On the new website, any member can enter a Trip Report, not just trip leaders. Enhancements are being worked on to enable photos to be attached to Trip Reports.

To submit a Trip Report on the website, go to EXPLORE, and Find Routes & Places, and select the Route-Place that you want to submit a Trip Report about. Scroll down to near the bottom where there is a blue bar. 'Trip Reports' is one of the boxes on the blue bar. Click on it and past trip reports will come up as well as a plain-text box where you can enter your own trip report.

Examples of Valuable Content for a Post-Trip Report:

- ▣ The dates that you visited
- ▣ Special delights of the trail – views, berries, flowers, wildlife
- ▣ Trail conditions
- ▣ Hazards along the route (stream crossings, lightning exposure, animals)
- ▣ Locations of reliable water
- ▣ Locations of good camps
- ▣ Any trail reroutes or route-finding tips
- ▣ Trailhead directions and parking, if not correct online
- ▣ Recommended side trips or basecamp day hikes
- ▣ Any other details you wish you'd known about this trip/route

Request a new Route-Place. Each route or place description must include information to help with trip planning including mileage, elevation gain, difficulties, maps, recommended guidebooks and permits. Before you begin the process to propose a new route, please review the steps at: *https://www.mountaineers.org/volunteers/schedule-an-activity/requesting-new-routes-places*. Then open the Route Request online form at *https://www.mountaineers.org/explore/routes-places/++add++mtneers.route.*

The title must be short and specific. It doesn't need to include the activity type (No need to say 'Backpack the Wonderland Trail', just call it 'Wonderland Trail').

The summary should be just one or two sentences that include where it leaves from and where it goes, the length, elevation gain, difficulty/strenuousness and selling points of the route.

The description includes more detail, including the trailhead, camp and water options, terrain details, potential seasonal hazards and unique positive attributes. NOTE: The description should not repeat what is already in the summary, and should not get too specific about how an individual leader might do an individual trip along that route (e.g. day 1 we'll go here, day 2 we'll go here) – that will happen in the Activity. Review some examples of Route-Place summaries and descriptions by going to EXPLORE, and FIND ROUTES & PLACES.

Then step through the rest of the form, including a photo (you need to own the image or have permission to use it), the land manager (from drop-down choices – enter Land Manager TBD if none of the drop down options fit), the start and end coordinates (or the trailhead and the farthest point out if it's a loop or out-and-back trip), length in miles, max party size (including the leaders), the months that the route is accessible, the primary activity type, the difficulty (from the drop-down choices), the elevation gain and highest attained elevation, and the recommended map and guidebook (from drop-down choices – choose NONE if none of the drop down options fit). SAVE when you reach the end.

Then go to the upper right of the page where there is a red box that says 'Private' and click on that box, then select 'Submit for Review'. Your proposed Route-Place will go to a designated staff person who reviews submissions for consistency and approves them – the process can take a few days up to two weeks if things are very busy at HQ.