

New Hike Leader Seminar

Sponsored by Tacoma Hiking & Backpacking Committee



Objectives

- Hike Leader Certification Requirements for Tacoma Mountaineers
- Understand the Roles and Objectives of a Leader in the Mountaineers
- Learn Leadership Techniques and apply them in scenarios

Hike Leader Certification Requirements for Tacoma Mountaineers

Review the leader resources page

<https://www.mountaineers.org/locations-lodges/tacoma-branch/committees/tacoma-hiking-backpacking-committee/hike-leader-resources/>

Steps to Becoming a Hike Leader

1. Attend a New Hike/Backpack Leader Seminar.
2. Submit Hike/Backpack Leader Application online.
3. Committee leadership will contact you for the next steps.
4. Required courses:
 - a. WFA, MOFA, or Trail Emergency Preparedness*
 - b. Wilderness (Off Trail) Navigation or Staying Found (On Trail Navigation)
5. Successfully lead a mentored hike.
6. Receive final committee approval.

We request that you go on at least three Mountaineers hikes prior to a mentored hike. At least one trip is encouraged to be with a Tacoma Hike Leader.

*WFA or MOFA must be taken within the first year of Hike Leader badge award. Trail Emergency Preparedness is a condensed course to get you going with basic knowledge while awaiting completion of a WFA or MOFA course.

Steps to Becoming a Backpack Leader

1. Become a Hike Leader (see above) and lead at least two day hikes prior to your mentored backpack trip.
2. Committee leadership will contact you for the next steps.
3. Earn supplementary badges appropriate to the types of trips you may lead
 - a. Basic Backpacking Skills Badge for single overnight trips
 - b. Advanced Backpacking Skills Badge for multi-night trips
4. Serve as assistant leader on at least one Tacoma backpack trip.
5. Successfully lead a mentored backpack trip.
6. Receive final committee approval.

We strongly encourage that you go on at least one Mountaineers backpack trip prior leading your mentored backpack trip, but this may be waived upon demonstration of significant experience with backpacking and/or leading Mountaineers trips in other activities or skill areas.

Final approval from the Hiking & Backpacking Committee Panel (What we're looking for)

- Technical Skills
 - Hiking and/or Backpacking skills as demonstrated on 3 prior trips
 - First-aid, Navigation, 10 Essentials (10 E's)
 - Leave No Trace (LNT)
 - Mountain Safety: identify and mitigate or avoid common hazards
 - Knowledge of The Mountaineers Standards and Land Management Agency Policies
- Soft Skills
 - Caring, service-focused, respectful, empathetic, safety-oriented
 - Group leadership, trip planning and communication
- If you need additional training or experience, we will work with you to get it
- If you are a 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 backpack leader
- Even if you are already a Mountaineers climb or scramble leader, we still would like you to lead a mentored hike because of the very different pool of people and challenges you may encounter

Maintaining your Hike and/or Backpack Leader badge:

1. Lead at least two trips or one multi-day trip for the committee each year. This could include leading any of the following combination:
 - a. Two day hikes (for hike leaders that are also not backpack leaders) OR
 - b. One day hike and one overnight backpack trip OR
 - c. One multi-night backpack trip.
2. Be in adequate physical and mental condition to properly lead each hike scheduled.
3. Meet and follow the Minimum Club-wide Standards for Hiking and Backpacking as outlined on the Mountaineers website.

First Aid Reimbursements

Committee will reimburse up to 50% of WFA or MOFA course for New Hike Leaders. To qualify, you must lead 3 hikes within 12 months of becoming a leader.

Committee will reimburse up to 50% of WFA or MOFA course recertification for Existing Hike Leaders. To qualify, you must be a Prior Year Key Leader or Super Volunteer. These badges are earned for leading a determined number of trips or volunteering a determined number of hours by The Mountaineers.

Roles and Objectives of a Leader in the Mountaineers

Why Lead?

- We need a diverse group of leaders to provide our members with a broad range of activities
- Leadership is a shift from a focus on individual success to group success
- Choose your own destinations, hike dates and types-pace of trips.
- Become part of a community – gain new lifelong friends.

Expectations:

- Plan, organize and carry out activities
- Represent the Mountaineers, a 110 year old brand, by leaving your participants and those you meet on the trail feeling great about their experience
- Accountability for the SAFE RETURN of your group

Responsibilities:

- 10 E's – carry and know how to use all of the Essentials
- Emphasize critical items in the description and pre-trip communications.
- Bring extras of especially critical items. If someone shows up without a piece of critical gear, see if someone else can share before leaving someone behind.
- Teach and lead by example, but don't be more rigid than the circumstances require for safety.

Leadership Techniques

Good Leaders Create Good Participants

- Healthy Communication & Clear Expectation Setting
 - Open, honest and humble communication (in both directions)
 - Clear expectations prevent most (non-emergency) issues
- Expedition Behavior: Group-Oriented Behavior
 - Care for the group and care for yourself
 - "How can I support you?"
- Inclusive Decision Making
 - Leverage group's knowledge and concerns
 - Engage participants to "own" the trip success
- Be engaged with your group

Leadership Styles

- Pacesetter – "Here we go! Follow me like this!"
- Authoritative – "I'm the expert and this is what we should do."
- Coaching – "Try this approach."
- Democratic – "What do you think we should do?"

There is no one right style. You will have a “default” style, but use them all as needed. Think about these and how/when to use them to maximize group success.

Conflict Management

- Assume good intent
- Be proactive – don’t wait until tempers flare
- Be discrete – don’t put someone on the spot or humiliate
- Stay calm and manage your emotional state
- Listen to their issue / concern with an open mind
- Reflect their comments back
- If you can accommodate safely, do so

Crisis Management

- Prevention is the best approach
- Stay calm and keep the group calm (don’t make the situation worse)
- Crisis Management Cycle
 - Assess the situation
 - Make a plan
 - Implement the Plan
 - Re-assess the situation
- Maintain focus on the big picture
- Keep the group together

In Case of Emergency

- Be prepared with basic skills and knowledge for how to handle basic first aid and other emergencies in the field
- Think through an emergency plan for every trip
 - Will you have cell coverage? If not, what is your plan?
 - How would you describe your location?
 - Do you have emergency contact numbers?
- Mountaineers emergency procedures – “Seven Steps” in leader resource materials
- Complete incident report when you close your trip

Running a Trip / Definition of a Hike

- More than 2 miles
- Restricted to trail / roads with some exceptions
 - Snow is okay unless there is the potential for an uncontrolled slide
 - Off trail is okay unless the terrain is unreasonably hazardous
 - Depends on the skills of the particular group
- Party Size
 - Minimum party size is 3 (safety)
 - Maximum party size is 12 (agency rules) unless lower limits apply

- If posted on the website and led within these rules, The Mountaineers provides you and your participants with liability protection provided you are not grossly negligent.

Running a Trip / 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 statute and The Mountaineers insurance as long as they are not “grossly negligent” – but the club can be sued based on your actions (or lack of action)
- Know and follow The Mountaineers guidelines and policies at all times (e.g. A hike should be a hike, not a scramble!)

Running a Trip / Difficulty 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

Pace (Leader Defined)

- Easy
 - Less than 1.5 mph (average with rest stops)
- Moderate
 - 1.5 – 2 mph average
- Challenging
 - > 2 mph average
- **NOTE:** rate trips conservatively, based on the average casual hiker. On the trail you must manage the hike for the success of the slowest, least skilled participant.

Running a Trip / 2-3 Weeks Before the Trip

- 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
 - This detail is essential to allow participants to self-screen in / out of a trip
- Include some highlights (e.g. old growth, fall colors, unique geology, stunning views, etc.)

Running a Trip / 3-7 Days Before the Trip

- Check the weather forecast, road and trail reports – do you need to adjust your destination or gear?
- Send out the “Hello Hiker” email(s) to confirm meeting time & place, hazards and demands of the trip, review the route (and highlights), re-enforce gear requirements and encourage carpooling
- Check the roster – screen participants
 - Do they have the conditioning and experience for the route planned?
 - You have the right and obligation to remove someone if they are not prepared for a safe trip

Running a Trip / Screening Participants

- Most problems on hikes or backpack trips reflect a poor match of participant capabilities / interests with the planned activity
- Set expectations with clear activity descriptions and pre-trip communications / this helps participants self-screen in or out
- If your trip requires certain skills and/or conditioning
 - Consider using the “Leader Permission Only” option
 - Check a participant’s activity and course history on the website
- You may need to contact the participant via email or phone
 - It can be awkward and frustrating, but don’t hide from this. It has a big effect on the success and safety of the trip!
 - Ask detailed, but considerate questions about recent activities they’ve been on. Who led? Pace (or how long the trip took)? How they felt after the trip?
 - Be fair and as inclusive as possible. Decide based on relevant facts, not hearsay or demographics. Can you accommodate a slower pace?
 - Be caring and respectful. Explain your goal is to ensure that everyone has a fun and safe trip. Suggest an alternate activity if yours isn’t a fit.
 - If a person doesn’t respond or isn’t prepared, you have the right to turn them down or cancel them from your roster.

Running a Trip / Carpooling

- Liability risks mean that leaders CANNOT assign or require carpools
- Leaders CAN encourage carpooling and facilitate by sharing contact info if authorized by participants (check & respect privacy settings on profile)
- Willing drivers are a precious resource
 - Remind people that it’s an important courtesy to reimburse their driver. The Mountaineers suggests a common reimbursement rate (about \$0.24 per mile)
 - Tell hikers the roundtrip mileage to the trailhead

Running a Trip / Privacy

- Mountaineers members can choose to make their profile data private
 - Our privacy policy states that 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
 - Leaders must ask permission before sharing even email addresses with other participants
 - <https://www.mountaineers.org/membership/mountaineers-privacy-policy-explained>

Running a Trip / At the Meeting Place

- Arrive at meeting place 10 minutes early
- The “Meeting Place” may be prior to the trailhead; participants are ultimately responsible for getting themselves to the trailhead
- Be sure that everyone has directions to the same trailhead and the right permits
- Introductions. Introduce yourself as leader, check off names on roster
- Check for essential equipment before people leave their vehicles and switch to carpools (boots, rain jackets, critical gear for this trip)

Running a Trip / At the Trailhead

- Introductions and ice-breaker
- Begin by emphasizing that Mountaineers travel as a group – we make decisions as a group, when possible, but as the leader you reserve the right to make the call for safety
- Review the map – route, junctions, hazards, handrails, rest stops, water stops, lunch, camp, turnaround time (and stick to it!)
 - Explain how you intend to manage the pace and when / where to regroup
 - Each person is responsible to know how to get back to the trailhead
- Encourage open, respectful communication of safety concerns and remind everyone that we all watch out for each other and finish together as part of a Mountaineers group
- Ask for volunteers to be first-aid leader and sweep
 - Trip leader and first-aid leader should be different so you can manage a crisis
 - Define the first-aid leader and sweep responsibilities for the whole group
- Address the procedure for bathroom breaks (“party separations”)
- Safety first! The group will turn around if you judge the conditions to be unsafe
- Get the Trailhead communications right and you will avoid many common issues on the trail

Running a Trip / During the Trip

- Manage the pace for the 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. Always maintain line of sight.
 - Participants should wait for the leader at junctions, significant stream crossings or hazards.
- Stay vigilant for participant, weather or route issues. Stop and help struggling participants.
 - Look for fatigue clues and adjust as needed
- Lead for the whole group's success! Don't go beyond the capabilities of the weakest or least skilled members.
- If the 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 (a hike is not a scramble).
- Gather the facts, listen, discuss alternatives, 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 can work in some situations, but not all.
- Don't be afraid to make an unpopular call if YOU believe it's important for the safety of the group. YOU are responsible for the group's SAFE RETURN to the trailhead.

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 using what you've learned today
- Discussion groups with facilitator
- Discuss your scenarios, choose one to report out to group
- Listen and consider taking notes from other groups' report outs

Wrap Up

Leading Trips With Youth or Pets

- Hikes with 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 the trip posting – don't spring it on 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
 - Party size is twelve heartbeats or less.

Leading in General

- 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'
 - Choose the committee you feel works best for you
- Backpack leading has special skill requirements and demands
 - Must first become a hike leader
 - Must lead a mentored backpack trip
- You can request additional mentoring or post hikes with a co-leader at any time

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?

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). One older very experienced man 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 scrambling 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?

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?

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 turns out to have a mix of some very fast hikers and one person who is slower, falling farther and farther behind. Your faster people are impatient and cold and want you to let them go ahead (“after all, there are more of them, and you posted the trip with a fast pace!”).

- 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 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?

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:

Your first backpack lead is a 3-day route with some challenging navigation, and you are anxious that your participants respect and follow you. You start by confidently leading from the front with compass and map, but wonder why no one seems to be offering input. At one point you were distracted and misread your map (navigation has never been your strongest suit), but your participants assumed that their confident and commanding leader was also the best navigator and followed you – five miles in an increasingly rugged and brushy direction and away from your desired camp spot. You ask advice from one of your group members who had their GPS out, and they said that they thought the route was wrong the entire time, but didn't want to insult or anger you by challenging your authority.

- As the trip leader, what might you have done from the beginning to bring everyone's skills and ideas into play?
- What could you do going forward on this 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?

Trip Leadership Scenario Discussion Exercise #6

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:

You're leading a backpack with a great group. They are 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 alternate route back out to town, forgoing the peak and sunset, or turn 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?