

Pre-Screening of Prospective Hike Participants

The degree of pre-screening needed for any given activity is at the leader's discretion based on the demands of the trip.

- ☐ Screening may not be needed for easy and short trips – though still very valuable to connect with your participants in advance.
- ☐ Courtesy is always important, but particularly so when you are questioning someone about their experience and capabilities. Always think about how you would like to be treated in a similar situation. Explain that you are asking these questions in order to help them and the group be successful and have an enjoyable and safe trip. Remind them of the aspects of the trip that participants must be capable of handling: mileage and elevation gain, the pace you need them to maintain, hazards (steep rocky descents, snowfields, water crossings, etc.) – with that information, some may self-select out of the trip.
- ☐ However, you should not count on interested activity participants necessarily being capable of success on your itinerary, having a realistic knowledge of their capabilities, or even having read and understood the demands of your trip in advance of trying to sign up. Some people will push back hard or even deliberately mislead you to get on a trip. It is your responsibility as the leader of an activity, and critical to the success of many even moderately strenuous or technical activities, that you take steps to assure that everyone on your roster is capable of completing the planned itinerary safely and compatibly. If you have backpacked with someone recently, you may be able to skip this step; if you backpacked with someone in the past, their capabilities may have changed and a check might still be important.
- ☐ Maintain strict confidentiality of their answers. You may share in a confidential way with other backpack leaders to confirm your conclusions, but never discuss their answers with, or in earshot of, another participant or anyone else.
- ☐ Even if someone has had problems in the past, don't jump to conclusions and bar them from your activity without first checking in with them on their recent experience and capabilities.

Leader Permission Function

A valuable website tool for allowing you to screen participants is the 'Leader Permission Only' function, which you can check 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 most important when you will need your participants to have more than a basic 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.

Checking Recent Experience on the Website

You can check on the courses and activities that your prospective participants have taken since the spring of 2014 (and a task is on the to-do list to add additional history information soon). To do this, after you log in on the Mountaineers website, 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.

Some Possible Email or Phone Screening Questions:

1. Please describe your recent hiking experience (last 12 months), including total mileage and elevation gain.
 - What is the most challenging hike (in miles, elevation gain, duration) that you have done in the last 12 months?
 - On Mountaineers trips, who were your trip leaders?
 - Have you been on group hikes before, with the Mountaineers or others?
 - Have you typically been at the front, the middle or the back of the group?
2. Please give me a general idea of the footwear and raingear that you typically bring on a hike.
3. How would you describe your current fitness level or conditioning? (probe with a local example like: how long would it take you to hike up and down Mount Si?)
4. Have you taken the Mountaineers navigation or first aid classes, or similar classes outside the Mountaineers? If so, when? Are you comfortable navigating established trails with map and compass?
5. Please describe any medical conditions, allergies or recent injuries/pain that could impact you on the trip. Please list any medications that you would bring with you (including blood pressure meds, diabetes meds, epi-pen, heart meds, other).
 - Do you use an orthopedic brace, splint or support of any kind, how long have you been using it, and have you done any multi-day backpacking with it on?
 - Have you had to cut short or turn back from -- or be evacuated from -- any recent activity (backpack, hike, scramble) due to a medical or biomechanical issue? If so, please provide details.

Possible trip-specific questions:

6. Have you been on a trip where it rained the whole day? How do you think you would deal with that if it were to happen?

7. Are you okay with wet stream crossings, perhaps up to your knees?
8. How would you describe your confidence and comfort level with walking across a stream on a log, hopping from rock to rock, descending or ascending in sometimes loose rocks or scree, crossing steep snowfields, dealing with heights or exposure?

If you haven't hiked with a person recently and your trip will have some significant conditioning or skill requirements, it's often very valuable to call them to follow up on their answers.

- ☐ This also establishes a personal connection.
- ☐ Allows you to offer assistance with trip planning, questions, concerns.
- ☐ Also a good idea to call or email to their recent trip leaders to confirm your conclusions.

If you are concerned that a person might have trouble on your trip:

- ☐ Consider whether your trip requirements are truly critical for the trip; might you be able to accommodate everyone with minor changes or added flexibility in your itinerary? Could adding a co-leader allow some slower people to participate?
- ☐ Coach and assist them to get prepared before the trip, if possible.
- ☐ If your data clearly points to a problem with them completing the itinerary successfully or being compatible with the rest of the group, first verify your conclusions with them. If they confirm your conclusions, explain why it is better for them and the group for them to choose a different activity, provide suggested alternative trips if possible, and help them get signed up.