

Summer Mountain Educator Training and Certification

Implementation Draft 10.13.18

1. Introduction

Mountain clubs in the United States have been offering introductory mountain experiences to students and enthusiasts for over a century. Training and certification standards have varied from one club to the next, but each organization has always prioritized quality leadership, risk management, and providing exemplary instruction and facilitation. The Summer Mountain Educator training and certification scheme was designed to unify and harmonize the pathway and credentials of volunteer leaders at all U.S. mountain clubs.

2. Scope and Terrain

Summer Mountain Educators facilitate mountain travel in non-technical terrain in summer conditions. Travel in Summer Mountain Educator terrain encompasses everything from casual on-trail walking and hiking to non-technical off-trail scrambling where hands are used to maintain balance and stability. Terrain may be loose and/or exposed, and sustained strenuous up and down hill travel are common. Summer Mountain Educators may encounter terrain that holds snow year-round* or rises above 3000m**.

*[Summer Snow](#) Endorsement

**[High Altitude](#) Endorsement

3. Stages of Summer Mountain Educator Training and Certification

Prerequisites: Summer Mountain Educators must be at least 18 years of age. They must have spent at least one year gaining personal experience in Summer Mountain Educator terrain through facilitated outings, personal adventures, or training programs. During that time, aspiring Educators should be able to present at least 10 documented outings in a variety of Summer Mountain Educator terrain.

Training: Training processes will vary from one organization to the next.

Assessment: Candidates are evaluated by Summer Mountain Educator mentors according to these Summer Mountain Educator certification standards.

Continuing Education: Once certified, the Top Rope Climbing Educator certification is valid for two years. Educators can renew their certification status through continuing education opportunities defined by Providers. If certified Educators do not meet continuing education requirements, re-training and/or re-assessment may be required.

4. Skills and Knowledge

Summer Mountain Educators are expected to demonstrate proficiency in the following skills and knowledge: movement and fitness, basic ropework, navigation and routefinding, trip planning, group management, emergency bivouac, emergency response and risk management, first aid, Leave No Trace, mountain sense, teaching, and mentoring.

Movement & Fitness. Summer Mountain Educators should be able to carry loads up to 25lbs, while maintaining a pace of one mile per hour, while ascending and/or descending 1000ft of elevation, for durations of up to four hours. Additionally, Summer Mountain Educators should be able to give credible recommendations for personal conditioning exercises and programs designed to achieve Summer Mountain Educator level fitness and movement abilities.

Basic Ropework. Certified Educators are expected to be able to use ropes to assist travelers in Summer Mountain Educator terrain. In general, ropework should be limited to hand lines to augment the security and speed of unroped travel. As a result, Certified Educators should be able to select and install simple improvised anchors on terrain features and vegetation.

Navigation and Routefinding. Certified Educators are expected to use terrain features and navigational tools to ascertain, at any time, their position in the world and the most reasonable route to their next objective. Additionally, Certified Educators should be adept at identifying the most reasonable route through macro-terrain features (e.g., gullies, ridges, low-angled slopes, and other conspicuous terrain features) and micro terrain features (e.g., secure footing, natural barricades, and shelter from natural hazards). Given a number of terrain choices, Summer Mountain Educators are expected to make choices that minimize undesired risk or consequence.

Trip Planning and Facilitation. Certified Educators are expected to be able to facilitate the full spectrum of a mountain outing, including creation, planning and preparation, successful execution of the outing, and any appropriate debriefs and reporting. Summer Mountain Leaders:

- Are familiar with a variety of planning resources, like guidebooks, previous trips logs and tour plans, maps, and narratives
- Conduct appropriate research and planning, which may include use of weather forecasting, observation tools, and land manager resources
- Inventory any anticipated environmental hazards, like altitude, lightning, water crossings, rock fall, exposure to elements and precipices, and flora and fauna hazards
- Communicate time plans, lesson plans, required equipment lists, menus and nutritional recommendations when appropriate
- Produce any legal, permitting, or organizational documentation required for the outing

- Coach participants in the selection of appropriate equipment and apparel needed for climbing outings
- Are aware of specific organizational policies regarding trip planning and facilitation

Group Management and Leadership. Certified Educators are adept at aspects of group management, including:

Planning and Preparation: Pre-trip, Certified Educators will adequately plan and prepare themselves and participants for the outing, including communicating expectations and requirements.

Responsiveness: On a given trip, Certified Educators will need to anticipate and respond to group and individual needs. Certified Educators may also need to respond to incidents or accidents.

Creating an Inclusive and Welcoming Learning Environment: Certified Educators should embody compassion, be skilled at interacting with different people, cultures, and ability types to create an intentionally inclusive, welcoming learning environment. Through behavioral contracting and/or other tools, Certified Educators encourage non-coercive, elective participation (i.e., Challenge by Choice).

Certified Educators have a mastery of these elements of leadership:

Communication and Listening: Certified Educators should have command of a variety of communication and active listening tactics, and should be able to shift between inquisitive and directive modes of discourse.

Interpersonal Skills: Certified Educators should be able to anticipate and facilitate the interpersonal needs of a team of climbers.

Role Modeling: Certified Educators should be aware of their influence and responsibility as role models and act accordingly.

Emergency Bivouacs. Summer Mountain Educators do not intend to facilitate overnight outings, however, Certified Educators possess the skills to do so in case that contingency arises. Those skills include, but are not limited to: use of stoves and campfires to prepare food and water, improvised natural or manmade shelters, and methods of staying warm and dry. Equipment selection and preparedness should enable bivouac skills when they are required.

Risk Management. Summer Mountain Educators have an understanding and appreciation of the risks involved in facilitating mountain outings. They also understand and can demonstrate the tools and techniques needed to identify, communicate, and manage those risks.

There are dozens of tools and techniques associated with the risks in each category, but Summer Mountain Educators should be particularly adept at the following:

- non-technical ropework (See “Basic Ropework”)
- Supervision

- Teaching and coaching (See “Teaching”)
- Planning and preparation including the proper administration of waivers, rosters, and permits (See “Trip Planning and Facilitation”)
- Group management and leadership (See “Group Management and Leadership”)
- Environmental awareness, including route selection and management, weather monitoring, educator-to-student ratios, etc.
- Emergency bivouac skills (See “Emergency Bivouac”)
- First aid and emergency medical care*
- Creating and/or adhering to emergency action plans

In addition to the skills above, Top Rope Climbing Educators are also knowledgeable about the following:

- Investment, engagement, and expectations of all parties on a given outing
- Standards of care and legal/liability relationships of all parties on a given outing

*Summer Mountain Educators are reasonably prepared to provide emergency medical care. Their demonstrated skills should include patient assessment, stabilization, treatment of minor injuries and illnesses, and communication and cooperation with advanced medical care.

Ethics, Sustainability, Access, and Leave No Trace. As ambassadors and stewards of mountain environments, Certified Educators role model responsible behaviors, including practicing and teaching Leave No Trace principles, having a working knowledge of local natural and cultural history, and maintaining a collegial demeanor when interacting with land managers, owners, and law enforcement.

The seven principles of Leave No Trace are:

- Plan Ahead and Prepare
- Travel and Camp on Durable Surfaces
- Dispose of Waste Properly
- Leave What You Find
- Minimize Campfire Impacts
- Respect Wildlife
- Be Considerate of Other Visitors

Mountain Sense. Certified Educators should feel at home in the mountains and, therefore, have the ability to make observations and adapt to changing weather, group dynamics, and impending hazards.

Teaching. Summer Mountain Educators are expected to demonstrate proficiency in the following teaching and pedagogical skills:

- Lesson planning and preparation
- Verbal and non-verbal communication

- Management and/or delivery of demonstrations
- Supervising appropriate activity practice
- Assessing levels of student comprehension and progress
- Adjusting curriculum and field-session training/practice as needed
- Use of visual aids and other teaching media
- Supervising session debrief
- Delivering feedback to individuals and groups
- Utilizing feedback to further develop self, individuals, and groups

Additionally, Certified Educators have and impart a basic awareness of the UIAA's MQL structure, and the role of the American Alpine Club and UIAA MQL providers places in it.

Mentoring. Certified Educators are expected to be part of the mentorship and education of future Summer Mountain Educators. They should be skilled at providing supportive and constructive feedback, navigating the paperwork and evaluations needed to support and document a candidate's matriculation toward certification, and understanding the larger importance of mentors in the community.