**Pre-Screening of Prospective Hike or Backpack 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 essential when you are questioning someone about their experience and capabilities – treat people the way 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.*
* Don’t assume that any interested person will be fit and capable of doing your trip at the posted pace. It is critical to the success of many activities that you ensure that everyone on your roster is capable of completing the planned itinerary safely and compatibly.
  + *If you have hiked or backpacked with someone recently, you may be able to skip this step; just remember that their capabilities may have changed if you haven’t done a trip with them in awhile*
  + *Don’t assume that you can get a full idea of their experience on the Mountaineers website. We have many new and current members who do a lot of their outdoor activities outside the club.*
  + *People will not necessarily be forthcoming or even truthful with you about their fitness and experience. Trips are hard to get on! Ask them about their recent experience including details of distance, gain and pace.*
* 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.
* Never jump to conclusions about someone purely based on their age, gender, ethnicity or medical conditions. Deal with only objective information about their experience and capabilities.

**Leader Permission Function**

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: 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 to cancel them from the roster until you’ve connected with them to verify their qualifications for the activity. Just be courteous – they might be new and not know what this function means!*

**If you haven’t hiked with a person recently and your trip will have some significant conditioning or skill requirements, it’s essential to check on their experience, skills and fitness.**

**Checking Recent Experience on the Website**

Before responding to a participant request, first check on the courses and activities that they’ve done with the Mountaineers:

1. Log onto your account on the Mountaineers website
2. Type the name of the person you want to get information about in the search bar at the top of the page, and ENTER. Click on the name you want. OR open the roster for your activity and click on the person’s name. Their profile will come up.
3. 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. You can also see who was the leader of recent trips they went on, and can contact that leader if you are really concerned about the person.
4. You can also click on any person’s name on your roster and then go to their profile, activities and courses history as above.

**Contact them by email or phone to get more details on their recent experience, skills and fitness.**

1. Describe your trip (distance, elevation and planned pace) and the specific fitness and/or technical skills required. Ask them to tell you about recent experience they’ve had on an itinerary like yours and how it went.
2. Ask them about their comfortable pace, explaining that you want to be sure that your group is compatible so that everyone has a good time.
   * *Many people won’t know what their pace is – if needed, follow up by asking about a recent trip, how many miles and gain, and how long it took them.)*
3. Share your trip objectives and ask about theirs. If they are looking for a conditioner and you are not, they may be frustrated with your pacing. If they want to take a lot of photos or hunt for mushrooms and you are hoping to hike at a brisk pace to get to a destination, you and the rest of your group may be frustrated by their pacing. If they like to start late from camp and/or do a lot of socializing at camp and you prefer to start early, walk all day and quickly have dinner and dive into the tent, you need to know that.
4. Tell them how you will manage the group’s pace. If you want to keep the group together throughout, tell them in advance that faster people may be asked to slow down for the benefit of slower people, especially if you’ve listed an easy to moderate hike or backpack. If your objective is conditioning and you will let faster people go ahead, be prepared to keep someone with slower participants and let them know that the group may split up. ***Don’t ever leave a slower hiker alone!!***
5. If you expect particular challenges like very cold or wet weather, very rocky or icy trail or long water-carries, it can be very helpful to ask them specifically about the gear and experience they have for those conditions.
6. If you expect technical challenges like steep scree descents, heights/exposure, off-trail sections, log crossings, swift-water fords or camps with bear pressure, these can be terrifying to people who haven’t experienced them before. Ask about their experience and comfort level with these conditions.
7. If your trip involves backpacking, you may want to ask them what gear they have and their typical base weight and total pack weight on a trip the length of yours. If most participants have light packs and one or two have very heavy ones, or vice versa, it may be hard to maintain a compatible pace.
   * Be clear about the food and water demands for the trip and about the low and high temperatures you expect so that they can be prepared – check to be sure that they have the right gear and know how to plan for enough food and water for the route.

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

* Consider whether your trip pace 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.