



Hike Leaders Workshop

Seattle Hiking Committee



Objectives

- Define “hike” according to club standards and explain the hike rating system.
- Describe the roles, responsibilities and expectations of a hike leader for the Mountaineers.
- Know the kinds of trips you want to lead, and how to attract participants who have the same interests and capabilities.
- Be prepared and confident to handle common challenges you will encounter leading groups on the trail.
- List a hike on the Mountaineers website.

Agenda

- Foundational Content – presentation
- Roles and Responsibilities of Hike Leaders - small group work, discussion

Break

- Hike leader scenarios – small group work discussion
- Posting a hike on the website - demo
- Next steps

Why become a Mountaineers Hike leader?

- Choose your own destinations, hike dates and types-pace of trips.
- Teach and assist less experienced people to experience the wilderness safely...*pay it forward*.
- Learn how to lead people and effectively handle a range of challenging situations--skills that carry over into other aspects of life.
- Become part of a community – gain new lifelong friends.

What is a Mountaineers “hike”?

- Club-sponsored walking trips > 2 miles (any committee sponsoring a hike - Naturalists, Photography, etc.)
- Restricted to trails/roads (maintained or unmaintained) with some exceptions:
 - Snow-covered trails OK unless route exposes party to terrain with avalanche hazards where a slip is likely to result in an uncontrolled slide, or where snowshoes are required
 - Off-trail excursions OK: LNT Principles followed, route does not expose party to terrain that is unreasonably hazardous for them to cross - depends on the skills of each particular group
- **Party size:**
 - Minimum party size is 3 (Seattle);
 - Maximum party size is 12 (agency rules), unless other party limits apply.
- If posted on the website and led within these rules, the Mountaineers provides you with liability protection (given that you are not negligent)



Mountaineers Difficulty Ratings

Difficulty (Route)

Casual	Up to 4 miles and up to 600' elevation gain
Easy (E)	Up to 8 mi. RT and up to 1,200 ft elevation gain
Moderate	Up to 12 mi. RT and up to 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 (How leader plans to cover the route)

Casual	Average pace <1mph & no technical challenges, special skills needed
Easy	Average pace 1 – 1.5 mph, no technical challenges, special skills
Moderate	1.5-2 mph average
Challenging	>2 mph average

Rate each trip conservatively, based on the average casual hiker....not based on how easy it would be for YOU.

Regardless of the rating, once on the trail you must manage your hike for the success of all participants

Requirements for Hike Leaders

- Current member, at least 18 years old; **At least 3 Mtneers club day hikes (non Urban hikes)**

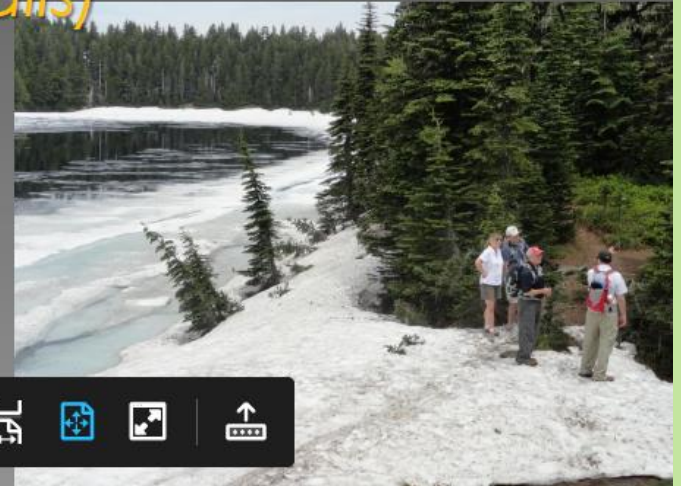
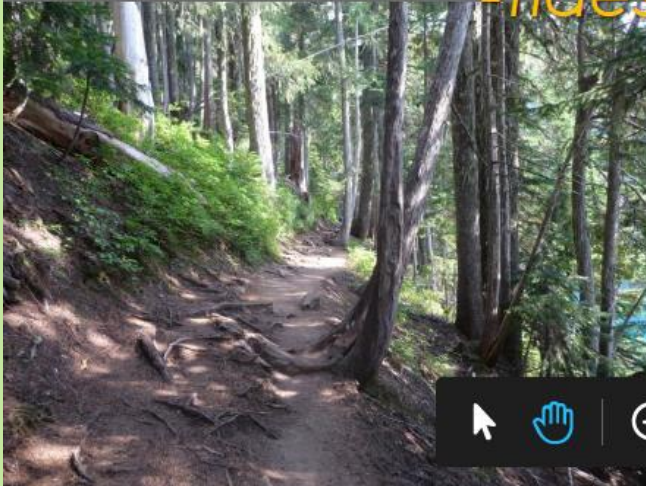
- Caring, service-focused, respectful, empathetic, safety-oriented

Must demonstrate working competence in:

1. Group Leadership
2. Basic hiking skills: Including gear, ten essentials, trail and camp skills, leave no trace principles – (Low Impact Recreation badge)
3. Navigation: Use of map and tools to ‘stay found’
4. Mountain Safety Skills/Knowledge: Common hazards, how to recognize and avoid or mitigate them
5. First Aid and Emergency Preparedness: Basics to handle common on-trail first aid and emergency situations (WFA or MOFA badge)
6. Knowledge of Standards and Policies: Mountaineers and land management agencies
7. Low Impact Recreation badge

Terrain hazards include:

- Steep slopes & cliffs
- Wet surfaces
- Exposed tree roots
- Loose and falling rocks
- Snow patches
- Tides (coastal trails)



Process to become a Hike leader

- Attend a hike leaders workshop (one-evening session – you're at it!)
- Complete a mentored hike (non-urban) with an approved hike leader (more on this later)
- Hiking Committee will review:
 - Feedback from mentored hike;
 - Hike mentor's evaluation of prospective leader; and
- Hiking committee grants hike leader status if requirements are met.

Youth & Pets



- Additional requirements: Leaders with hikers under 18 must be a qualified youth leader (even w/parents on the trip). For more information: http://www.mountaineers.org/forms/working_with_youth_faq.pdf
 - “Certified Youth Leader” is noted in activity posting once you’ve earned your qualification.

- **Hikes with dogs:**
 - Include in trip posting
 - Follow posted trail rules!!
 - Don’t bring dogs in active wildlife areas.
 - Party size is twelve heartbeats or less.
 - Contact the hiking committee to connect you with experienced “hikes with dogs” leaders for best practices on these hikes.

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 statutes and Mountaineers insurance as long as they are not ‘grossly negligent’ – but the club can be sued based on your actions (or lack of)

Legal Considerations

How do you control the risk of legal liability?

- Don't lead until you have the basic competencies for the hike you intend to lead
- Communicate any hazards in writing to participants before the trip
- Ensure that your participants are prepared and capable
- Review the hazards in a safety briefing before you set out, and along the way
- Bring your participants home safely

Legal Considerations

We can't eliminate all risk in outdoor adventure.

- Take all reasonable and prudent measures to manage the risk of injury.
- Respond to emergencies responsibly within your level of training.
- If an incident happens, engage Mountaineers emergency procedures immediately, and document what happened

LEADERSHIP ROLES AND RESPONSIBILITIES

Role of the Leader

- Plan, organize and run safe and fun activities
- Authority and accountability for the SAFE RETURN of your groups. ***Getting your group back safely is your top priority!***
- Ensure that your participants are capable and prepared to succeed on the posted itinerary.
- Be a positive, responsible role model of courteous trail behavior and 'leave no trace'
- *You are the face of the Mountaineers, a 115+ year old brand (founded in 1906!) **Leave your participants feeling great about their experience!***

Leader Responsibilities: Privacy

- Mountaineers members can choose to make their profile data private
 - 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.
- Ask for permission before sharing even email addresses with other participants.



Leader Responsibilities: Carpooling

- Mountaineers' legal responsibility starts at the trailhead – participants are responsible to get themselves there
- Liability risks mean leaders and staff CANNOT *assign* or *require* carpools.
- Leaders CAN *encourage* carpooling and *facilitate* by sharing contact info (if authorized by hiker)
- Willing drivers are a precious resource.
 - Remind people that it's an important courtesy to reimburse their driver. You can suggest a common reimbursement rate
 - Tell hikers the round-trip mileage to trailhead – can include in Hello Hikers email.

Leader Responsibilities:

Know basic navigation to *Stay Found*

- Review the map regularly as you go along to “read” the terrain, route and distance you’ve traveled
- Always carry a good topo map of your trail - know how to orient to north, read the scale, lines and symbols
 - Learn how to use watch, compass, altimeter with your map to figure out where you are
- DON'T RELY ON GPS ALONE. Batteries, satellite links can fail.

Check out ‘Staying Found’ or On-trail navigation classes for hikers and backpackers!

In Case of Emergency

We expect our leaders to have basic skills and knowledge for how to handle basic first aid and other emergencies in the field.

- Mountaineers emergency procedures – ‘Seven Steps’ – in leader resource materials.
- Trail Emergency Preparedness evening class and Wilderness First Aid (WFA) classes available
- If incident occurred, complete an incident report when you close your trip

Hike Leader Responsibilities: Leader Checklist

- Before the hike
- At the meeting place
- At the trailhead
- On the trail
- In case of emergency
- After the trip



Group Activity

Flip Chart Round Robin

Leader Responsibilities:

Before the hike:

2-3 weeks in advance (or more if needed):

- Research trail conditions, recent trip reports to select a destination
- Identify any reservations or permits required. Make arrangements for your group or tell your group what they need to do.
- Post the hike on the website, with clear and concise description of the route, difficulty rating, pace, hazards, physical and gear requirements.
 - “Leader Permission Only” option
- ***The detail you provide in the activity description about the demands and risks of the trip are essential to the self-screening and preparedness of your participants.***

Leader's Notes Section of Hike Posting

Day Hike 1

9.2 miles, 3000' gain

We'll tackle this at a slow-to-moderate pace (slow on the lengthy steep section!) and hope to have time to enjoy our beautiful destination.

Leader's Notes

- **[Meeting place and time, Covid info]**

Day Hike 2

9.2 miles, 2900' gain

Challenging and strenuous day hike to spectacular alpine area. Requires conditioning, experience and skills in hiking in steep/rough/rocky terrain.

Leader's Notes

As this is a challenging hike with a significant vertical ascent and technical skills (approaching scrambling level) I may be in contact with you to confirm your recent hiking background and comfort level with rugged and steep terrain. Please read trip reports from WTA to get a feel for the hike prior to registering. Participants must have good hiking boots and adequate water for a long day, and potentially warm conditions.

Leader Responsibilities: Before the hike (continued)

3-7 days in advance:

- Check the **weather forecast**, road and trail reports – adjust destination or gear and skill needs; change destination if needed
- Review the **route**, ensure you have up to date topo map
- Send out ‘Hello Hiker’ email to confirm meeting time & place, hazards and demands of the trip, gear requirements, facilitate carpooling
 - Emphasize critical items in description and pre-trip communications
 - Consider carrying extras of especially critical items.

Leader Responsibilities:

Before the hike (cont.): Screening Participants

Most problems on hikes or backpacks reflect poor match of participant capabilities/interests with the planned activity.

- Check roster – screen participants to be sure that everyone is conditioned and experienced to be safe and have fun on your hike at the planned pace
- Set expectations with clear activity descriptions and pre-trip communications - help participants self-screen.

Leader Responsibilities:

Before the hike (cont.): Screening Participants

- If your trip requires certain skills and/or conditioning, and you don't know a person on your roster:
 - Check their activity and course history on the website
 - If you need more information, set up a phone call. Ask detailed but considerate questions to ensure that they are capable:
 - *Recent activities they've been on? Who led? Pace?*
 - *If they don't know their pace, ask how long it took them to complete a recent hike*
 - *Be caring and respectful –explain that you want to be sure everyone will have fun and be successful. Suggest an alternate activity if yours isn't a fit*
 - *It can be awkward, but can have big effect on trip success and safety!*

Leader Responsibilities:

Before the hike (cont.): Screening Participants

- Be as inclusive as possible. Can you find ways to accommodate a slower pace within your schedule? (Co-leader?)
- Make a decision based on relevant facts, not demographics or hearsay.
- If a person never responds, you have the right to turn them down or cancel them from your roster.

Leader Responsibilities:

At the meeting place (P&R)



- Arrive at meeting place 10 minutes early
- Have trip roster (hard copy), map, weather reports handy for reference. Keep cell phone turned on
- Introduce yourself as leader, check off names of hikers on roster.
- Identify no-shows for reporting on Activity Report
- Be sure that everyone has directions to the same trailhead, and the right permits!
- Equipment check

Leader Responsibilities:

At the meeting place (P&R)

- It's not required to check everyone for all ten essentials before every trip.
- Teach and lead by example but don't be more rigid than the circumstances require for safety.
 - *If someone shows up without a piece of critical gear, see if someone else can share or decide if it's truly essential before leaving someone behind. That could be the last Mountaineers trip they choose to take. Be a teacher – help them succeed.*

Leader Responsibilities: At the Trailhead (1)



- Introductions and ice-breaker
- Emphasize that Mountaineers travel as a group.
- Ask for a volunteer to be first-aid leader, sweep – explain the role of each of these
- Ask participants to inform Wilderness First Aid leader of relevant medical/health conditions in private
- Describe the hike and trail conditions, potential problems/challenges, pace, side trails, scenery, etc.
- Review the map – route, junctions, rest stops, water sources, lunch, turnaround time

Leader Responsibilities:

At the Trailhead (2)

- Establish trip expectations: be explicit about :
 - How you intend to keep group together (i.e., wait at intersections, stream crossings); party separation procedure; front guard; sweep.
 - Manage pacing dynamics.
 - ***Safety first! Will turn around if you judge conditions to be unsafe.***
- Remind drivers to post any necessary passes; remove valuables from view
- Encourage communication of safety concerns, needs, any illness or injury as you go along – why this is so important to everyone's safety

Leader Responsibilities: On the Trail



- Plan to stop within 10-20 minutes for a clothing adjustment and pacing check.
- Don't let the group get too spread out
- Check-in with people to see how they are doing
- Stay vigilant for participant, weather, route issues.
- Manage the pace for 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
 - YOU are responsible for safety. Don't back away from doing the safe thing just because someone pushes hard or gets frustrated. Bring it back to everyone's responsibility to the whole group.
 - ALWAYS require that all participants re-group at all junctions and significant stream crossings or hazards.

Leader Responsibilities:

On the Trail (continued)

- At rest stops allow slower hikers to rest after catching up with the faster ones
- Splitting the group - Avoid doing so if possible.
 - If an individual insists on leaving the group have them sign out in front of witnesses by initialing name on trip roster with date & time
- If conditions change or the route proves more difficult than the weakest member can complete safely, find a safer alternative or turn around the group.



- Avoid 'mission creep'. Lead the trip you posted.
- Gather the facts, listen, discuss alternatives, but also be decisive and confident. Explain your rationale relate it to the safety of the group.
- Draw out the quiet people. Watch for the 'herd mentality'

Urban Walks

- Obey traffic laws at all times.
- Wait for lights at controlled intersections
- Cross in designated crosswalks where evident.
- Walkers should always look both ways before proceeding across an intersection.
- When a car is stopped at an intersection, walkers should make eye contact with the driver before proceeding across to ensure that the driver sees them.

Leader Responsibilities:

After the Hike

- Ensure everybody has returned to trailhead
- Remind passengers of carpool driver reimbursement rates
- If dinner/food stop planned ensure all have directions (and ride back to P&R!)
- Make sure all cars start before leaving
- Close the activity online within 1 week
 - Indicate no-shows and late cancellations
 - Report all accidents or injuries, even minor ones

What would you do if...



Leadership Decision Making 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
- Break into 4 groups of 3-5 people
- You will be given a scenario – discuss, answer the questions, be ready for informal report out to the group
- Listen, consider and take notes from the other groups' report outs

Leadership is not a science to be picked up in a book or course, but an art to be learned over time. -- John Graham



Next steps to become a trip leader

- Email Seattle Hiking Committee indicating your interest in proceeding and the name of your mentor.
 - You will be granted temporary leader status which enables you to list a hike on the Mountaineers website.
 - Hiking Committee can help identify a mentor
- Review all the class reference materials.
- Select a hike to lead - research the hike
- Contact mentor directly; review what is expected before, during, & after the hike
- Post the hike on the website
- Lead the hike – must be within 6 months of the seminar

Next steps to become a trip leader (cont.)

After your mentored trip:

- Close the activity on the Mountaineers website within two-days after completing the hike.
- Email the Hiking Committee at SeattleHikeLeader@gmail.com with the date/destination of your mentored hike that you completed, name of your mentor and request to become an approved regular hike leader.
- Have your mentor contact the Seattle Hiking Committee regarding their observations and recommendations from the mentored hike at SeattleHikeLeader@gmail.com.

Next steps to become a hike leader (continued)

- Your chosen hiking committee will review your mentor's evaluation from the mentored hike and grant hike leader status if requirements are met.
 - Select a hiking committee near your home if you want to participate in committee activities, events and local leader training; otherwise choose the committee that runs the activities you most identify with.
 - Can request additional mentoring or post hikes with a co-leader if you wish.

How to Post a Trip

- Refer to Volunteer – Leader Resources on the club website for step-by-step and video tutorial.

[How to Post a Trip online](#)



A marmot with grey and black fur is sitting in a field of green plants. In the background, there are blue mountains and a clear sky. The word "QUESTIONS?" is written in white, bold, sans-serif font across the center of the image.

QUESTIONS?

Books on Leadership

- Outdoor Leadership: Technique, Common Sense & Self-Confidence – John Graham

