

# Outdoor Leader Handbook

**Leadership Training Department**

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[www.outdoors.org/handbook](http://www.outdoors.org/handbook)



Feedback on this handbook is always welcome.  
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## Introduction

Leadership is an association between an individual (the leader) and a group of people sharing a common interest or goal, with the leader guiding the group's behavior. One of a leader's most important functions is to influence the members of a group to work together for the benefit of all. During many outdoor activities, a group of people working together will be able to accomplish much more than one person acting alone – and the activity will be safer and more enjoyable. A leader's ultimate responsibility is to a group rather than to themselves or to their friends.

When we address the issue of outdoor leadership, we must consider the **characteristics of a leader and group** members; the **outdoor environment** in which an activity takes place; and a **group's objectives** for an activity. Also, it is important to recognize that although an individual may be an effective leader in one situation, they may not be effective in others. For example, a person who can successfully lead a small, experienced group of day hikers in the White Mountains of New Hampshire might find it difficult to lead a large group of less experienced day hikers in Harriman State Park in New York (or vice versa).

Outdoor leadership skills can be developed and improved over time through a combination of self-study, formal training and experience. Leadership trainings are offered frequently by volunteers and staff of the AMC. The trainings range from a single day to a weekend. If you are looking for additional training, the AMC offers several courses each season through the Guided Outdoors program.

Prospective leaders should start by co-leading trips with experienced leaders and by volunteering to “sweep” on these activities. (By sweeping, a leader will gain first-hand experience of the problems likely to occur in the back of a group.) We also recommend prospective leaders work with several different leaders to familiarize themselves with a variety of leadership styles and techniques. After observing different styles, leaders can choose techniques that work best for them.

This AMC Outdoor Leader Handbook has the following goals:

- **To provide information for leaders to assist them in minimizing risk while leading enjoyable AMC trips.**
- **To raise each leader's level of outdoor leadership awareness.**
- **To help leaders become aware of the skills they need to develop.**
- **To build confidence and enthusiasm about leading AMC trips; and to teach leaders how to plan, organize, and lead AMC trips.**

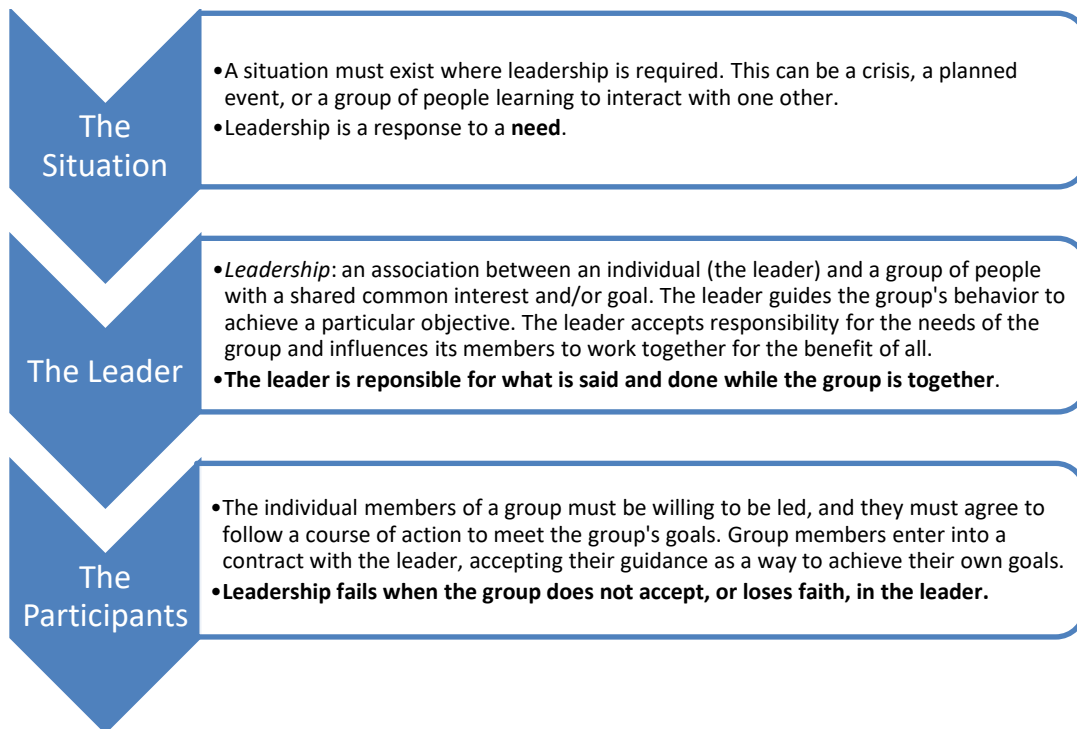
# Leaders and Groups

This chapter provides suggestions and guidelines for:

<b>Section I: Leadership</b>	
	Leadership Approaches
	Communication
	<i>Resource: AMC Internal Acronyms &amp; Terms</i>
	Decision Making
<b>Section II: Group Management</b>	
	Group Life Cycle
	Group Dynamics
	Conflict Management
<b>Section III: Diversity, Equity &amp; Inclusion</b>	
	Facilitating a Welcoming & Inclusive Atmosphere
	Inclusive Language
	<i>Resource: AMC On-Demand Trainings</i>

## Leadership

Leadership is an elusive concept. What makes people follow a leader? Why do some people follow while others do not? Are people born with the ability to lead or can it be developed? Exactly what is leadership?



No single personality type is preferable for leadership and leadership traits can be found in all personality types. Generally, a person who is comfortable with responsibility, decision-making, and being a resource for others will find satisfaction in serving as a leader.

Leaders become most effective through hard work and extensive experience. In the outdoors, a leader must be prepared to face physiological, psychological, and environmental challenges. Experience generally reduces a leader's anxiety about the situations they may confront, and thus makes them more confident and skillful than someone with less experience. An experienced leader may also have a better understanding of their own values, skills, and personality, and will have developed the ability to select an appropriate approach for relating to their participants, depending on the situation.

## Leadership Approaches

The way in which a leader approaches both a group and a situation is called a **leadership approach**. Leadership approaches fall along a continuum with infinite possibilities along the line. One end of the continuum is more leader-focused with the leader taking a more active role in setting the goals and making the decisions for the group. The other end of the continuum is more group-focused with the leader being more hands-off while engaging and empowering the group to set goals and make decisions together as a group.

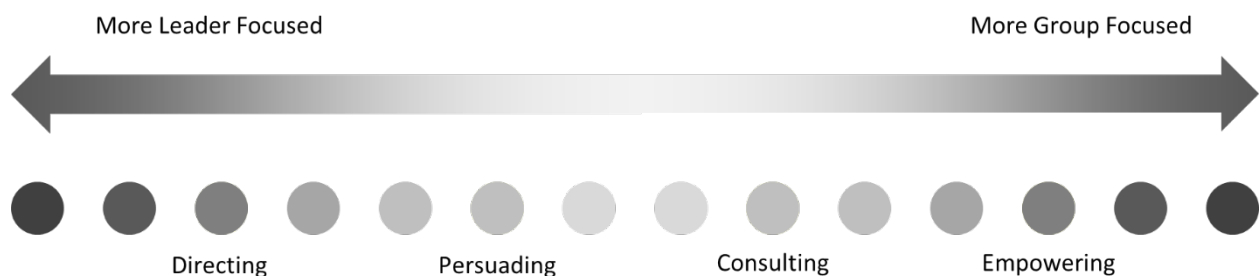
Along the leadership continuum we can pick four examples of leadership approaches that help demonstrate how leadership can shift between direction being given by a designated leader to self-leadership by the group:

**Directing:** Is heavily leader focused. The leader gives instructions, sets goals, and makes decisions to keep the group safe and on task.

**Persuading:** Is moderately leader focused. The leader has desired outcomes for the group goals and decisions. The leader gets group buy-in through discussion or explanation.

**Consulting:** Is moderately group focused. The leader provides procedures and information to enable the group to set goals and make decisions based on the leader's input.

**Empowering:** Is heavily group focused. The leader sets limits and ensures the group has the required skills while the group makes decisions and sets goals for the group.

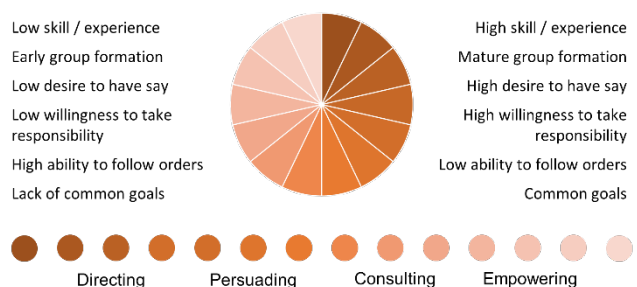


## Choosing a Leadership Approach

How do you determine which leadership approach to use for a given situation? This can be a challenging question, but skilled leaders will consider all of the factors present in a given situation and be able to choose an approach and then change and adapt that approach as the situation morphs over time. Three primary categories of factors to consider are: **Group, Environmental, and Leader Factors**. For each of these categories, various factors, in their extreme, may require a more Directing (leader-focused) leadership approach or an Empowering (group-focused) leadership approach. However, there is a lot of grey area along the continuum and most factors do not present themselves to an extreme. In addition, there are often more than one factor presenting themselves!

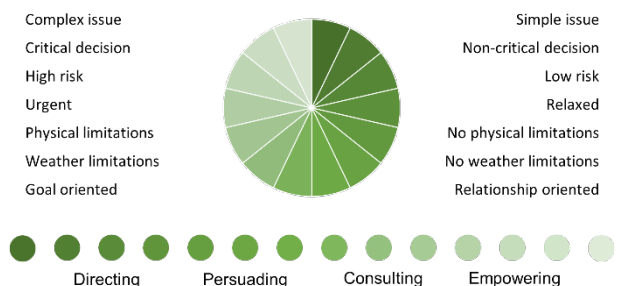
**Group Factors:** Include characteristics of the group such as their experience and skill level, their stage of group formation, their readiness and ability to follow orders, and the degree to which they share common goals and expectations. For example, an inexperienced group in which the individuals have just met each other will likely be more receptive to a Persuading or Directing leadership approaches. For groups that are more highly skilled in the activity, know each other well, and have a shared group goal, the leader may employ a more Consulting or Empowering leadership approach.

### Group Factors Continuum



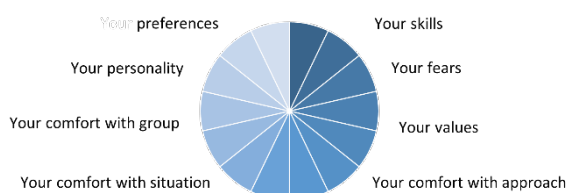
**Environmental Factors:** Include both the physical aspects of the situation such as the weather or the terrain the group is traveling on, as well as less tangible aspects such as any timeframe limitations, the complexity of the group's problem or objective, and the main goal of the group for the trip. For example, if someone in the group is injured and there is a thunderstorm rolling in while the group is standing on an exposed trail, the situation may be urgent and complex which may require a more Directing leadership approach to get the group to safety and address the injured individual. If the group is paddling on a calm river in good weather, the leader may be more Consulting or Empowering to allow the group to make decisions about where and when to stop for lunch, take photos, or even to alter the itinerary to include a swimming hole or other destination.

### Environmental Factors Continuum



**Leader Factors:** Include a leader's own values, skills, and personality which can all influence how they approach a particular leadership situation. Some leader factors include: Whether a leader is skilled at the activity or relatively new to it; their tolerance for risk; or whether they tend to be relaxed and easy-going vs. more task/goal oriented. Where on the

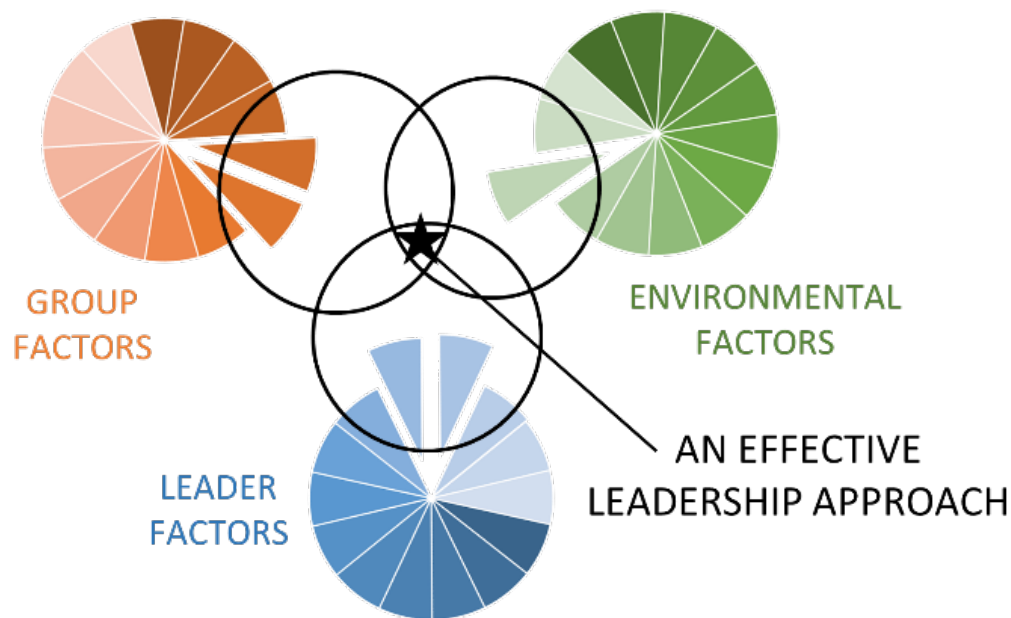
### Leader Factors



leadership continuum each leader factor falls is very subjective and may be different from one leader to another.

Only when the leader understands the Group and Environmental factors as well as their own traits, personality, and skills, they can determine the most effective leadership approach for a situation. A leader is most in control of their own variables and may need to overcompensate in their non-default leadership approach, depending on the situation. The Group and Environmental factors may change over the course of a trip and an experienced and skilled leader will recognize these shifts and adjust their leadership approach for the situation at the time.

There are no right or wrong leadership approaches, but rather, effective and ineffective approaches for a given situation and set of factors. A good leader approaches each situation and each participant as unique. Previous experience might inform a leader's decisions, but flexibility and adaptation are the keys to success as they recognize and evaluate all of the factors present in a situation.



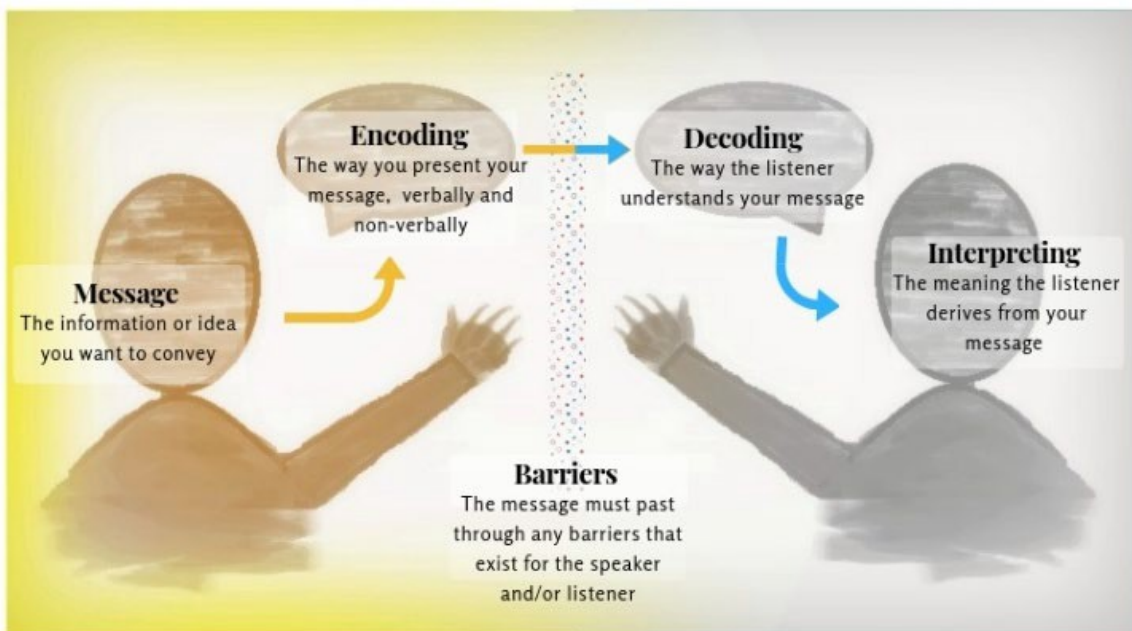
**Leadership approach is also an important factor to consider when selecting or working with a co-leader.** If there is a leadership approach you find challenging, consider seeking out a co-leader who is innately comfortable with that approach. When working with a co-leader, take time to discuss your strengths and challenges in terms of leadership approaches so you can give each other support as well as opportunities to practice different roles.



## Communication

Communication is the exchange of information from one person to another. It can take place consciously and subconsciously, verbally and non-verbally. Though we communicate in a variety of ways every day, we seldom stop to consider all the steps that are involved in the process.

As a leader your communication skills can make or break a group experience. Accomplishing a shared goal is at the core of every AMC group outing, and if participants and their leaders are not clearly understanding one another, building or maintaining that unity becomes a real problem.



### Clear and inclusive communication by the leader:

- Builds rapport and enthusiasm in group members (people are more willing to participate and better able to work together if communication is open and effective).
- Conveys your professionalism and trustworthiness as a leader (participants will be more willing to follow you if they clearly understand your boundaries, motives and objectives).
- Sets the tone for a safe, fun and successful group culture.

Since communication is a such a regular part of every-day life, its importance can be easy to overlook when developing leadership skills. However, many of the most charismatic and effective leaders throughout history have stood apart for their ability to communicate their passion and their vision. Being highly intentional about how you convey messages to participants takes patience and practice and will ultimately pay off.

[AMC Internal Acronyms & Terms](#)

**Some important elements of communication to be mindful of include:**

<i>Element of Communication</i>	<i>Your Goals as a Leader</i>
<p><b>Verbal</b> Talking is what many of us first think of when we consider communication, and it is often a primary channel for sharing information – which means it shouldn't be done carelessly when in a leadership role.</p>	<ul style="list-style-type: none"> <li>◆ Be open and honest, and encourage the same from others</li> <li>◆ Express appreciation and acknowledge others' contributions</li> <li>◆ Treat everyone with fairness and equity</li> <li>◆ Ask open-ended questions and utilize motivational interviewing (paraphrasing or rewording what has been said, and then repeating it back to the speaker) to solicit engagement from participants.</li> <li>◆ Stay in control. Express yourself in a calm and collected tone. Take responsibility when necessary and own your mistakes. Apologize.</li> <li>◆ Be aware of comments or language that may offend, alienate or leave out people in your group. Remember, you can't tell the background or history of any participant just by looking, so always encourage general inclusion of all (i.e. address the group as "folks" instead of "you guys," etc.)</li> <li>◆ Be intentional and provide detailed information. Beginning with the trip planning process, moving to the start of the trip and continuing throughout your experience, be thoughtful about what information needs to be conveyed to participants. Be concise but thorough to ensure that people's expectations are realistic, that everyone is on the same page about the group's objectives and that everyone knows where to be, when, and how to get there.</li> <li>◆ Target your vocabulary and information to your audience. Use common language, as you teach more technical terms.</li> </ul>
<p><b>Nonverbal</b> Studies have shown that as much as 70%-93% of our communication is nonverbal. Nonverbal communication is a language without a fixed meaning. Situation, people, and culture all distinctly influence meaning and usage. It tends to be emotionally driven and is sometimes a clearer representation of person's opinions and ideas than their words.</p>	<p>Consider:</p> <ul style="list-style-type: none"> <li>◆ <b>Body movements</b> (hand gestures, shaking the head, etc.)</li> <li>◆ <b>Posture</b> (how you sit or stand, arms crossed, etc.)</li> <li>◆ <b>Proxemics/Personal Space</b> (physical proximity between 2 or more individuals)</li> <li>◆ <b>Eye Contact</b> (looking at the speaker or averting your eyes)</li> <li>◆ <b>Para-language</b> (aspects of the voice such as tone, pitch, and speed)</li> <li>◆ <b>Facial Expressions</b> (movements or reactions in the face)</li> <li>◆ <b>Physiological Changes</b> (sweating, blinking, etc.)</li> </ul>

<p><b>Listening</b> Listening is an incredibly important component of effective communication – though it is often overlooked. Ensuring that all members of your group feel that they have the opportunity to be heard will go a long way to smoothing the group process.</p>	<p>◆ <b>Stop.</b> Relax, clear your head of other thoughts and don't worry about giving any input for now – be patient and let the speaker move at their own pace. Remove or mitigate distractions (make yourself comfortable and put away other tasks so you can truly be focused on the speaker).</p> <p>◆ <b>Invite communication.</b> Think about the needs of the speaker, encourage them with nonverbal communication techniques (eye contact, nodding, open body language, etc.) to show that you understand and want to hear what they have to say. Try to see things from the speaker's prospective, be empathetic and keep an open mind. Reserve judgement and stay impartial. Focus on simply understanding.</p> <p>◆ <b>Listen for more than words.</b> Pay attention to the speaker's non-verbal communication to get a better idea of the message they are conveying. Focus on the big picture of their message, not just their words.</p>
<p><b>Barriers</b> Many potential obstacles exist that can make clearly transmitting your intended messages difficult. Some are obvious, but many are happening beneath the surface. The more familiar you are with recognizing these barriers the more efficient you can become at overcoming them.</p>	<p>Consider some of these most common barriers:</p> <ul style="list-style-type: none"> <li>▪ <i>Language Barriers:</i> In addition to the barrier of simply not speaking the same language, accents and the use of jargon, slang or abbreviations can all present challenges or misunderstanding.</li> <li>▪ <i>Cultural Barriers:</i> Communication looks and sounds different depending on your culture. Culture can dictate the tone and volume used, acceptable proxemics and other body language, what topics or phrases are offensive or taboo, and much more. Without knowledge of these cultural norms, something that is innocent and normal to one individual might seem rude and hostile to another.</li> <li>▪ <i>Psychological &amp; Attitudinal Barriers:</i> The mental or psychological state of the people involved in a conversation can greatly affect the success of the communications. For instance, anger, stress, shyness, lack of motivation, exhaustion and frustration can all negatively impact how messages are presented and/or received.</li> <li>▪ <i>Physical Barriers:</i> Distance between speakers can often prove a challenge. A lot more can be conveyed in a face-to-face conversation than one taking place over the phone or email. Similarly, sometimes a physical location is not conducive to good communication (such as in choppy waters with a strong wind while out in a lake, canoeing). Plus, difficulty hearing or other disabilities someone might have can require modified communication.</li> </ul>

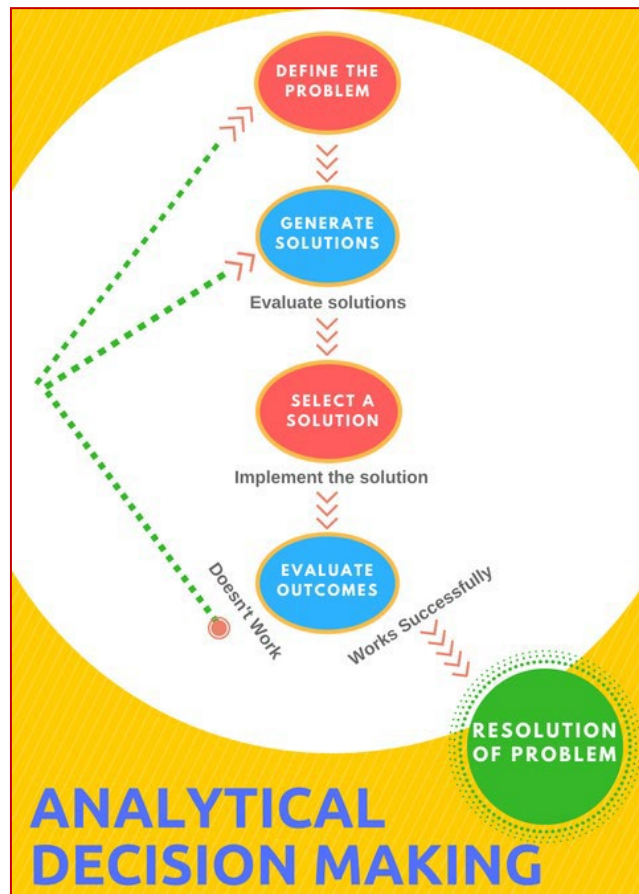
<p><b>Feedback</b>  Giving and receiving feedback is an important skill. Feedback can be positive or constructive. Giving both types of feedback as a leader is crucial for the success and happiness of your group. Just as with any conversation that can be sensitive, it is important to approach it mindfully so that the feedback can be clearly heard, understood, and accepted - particularly when it is constructive. As a leader, solicit feedback from the group members, and be sure to use this feedback to modify your approach with those who delivered the feedback as well as to improve your own skills.</p>	<p><i>When Giving Feedback</i></p> <ol style="list-style-type: none"> <li>1. Feedback should address behavior and not someone's personality</li> <li>2. Feedback should come from a 1st person perspective. You can talk about how a certain behavior made <i>you</i> feel, or what <i>you</i> thought.</li> <li>3. Try to make your feedback as specific as you can. Address specific behaviors or instances instead of general actions.</li> <li>4. Make your feedback timely.</li> <li>5. Choose an appropriate time. If someone is very worked up or upset, they are not likely to react positively to feedback.</li> <li>6. Consider asking someone if it is alright if you offer them some feedback before launching in to it.</li> </ol> <p><i>When Receiving Feedback</i></p> <ol style="list-style-type: none"> <li>1. Assume good intentions. Someone is providing feedback not because they want to make you feel bad, but because they want to help you improve.</li> <li>2. Listen, don't argue. Don't be thinking about how you are going to respond.</li> <li>3. Ask clarifying questions, if you need, but do so in a reflective and non-confrontational manner.</li> <li>4. Be sure to thank whoever is providing you the feedback.</li> </ol>
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Sourced from: Freierman, Koup, & Gilbert, "A Mountain Classroom Leadership Development Curriculum" and CMC State Safety and Leadership Committee. "The Colorado Mountain Club Trip Leader Manual"

## Decision Making

As an outdoor leader, you are constantly responsible for making decisions for the group. When we make our decisions, we often do not pay too much attention to the information or thought processes we utilize. Most of us like to view ourselves as informed, responsible, rational human beings who exercise good judgment. When we make decisions, we sometimes rely on information that is faulty, irrelevant, or incomplete. We allow our decision-making processes to be influenced by peer pressure and our own personal desires, prejudices, and deeply engrained behavior patterns. Decision are also affected by:

- Time: How quickly do we have to decide?
- Information: Do we have a lot of reliable information available to make our decision or not?
- Human factor: Are we calm & relaxed? Operating in under a tremendous amount of stress?



In some situations, there may be an optimal solution—which we can identify if we work at it. Many times, this isn't the case: We must make a choice and hope for the best. If we are lucky, when we make a poor choice, we can begin the process again and hope for a better outcome.

Outdoor leaders typically rely on one of three models to make decisions: an analytical model, a risk/benefit model, or a heuristic model. Differences between the models include the amount of information known about the situation and the amount of time available to decide.

Analytical	Risk/Benefit	Heuristic
☞ Thorough	☞ Modest amount of time	☞ Very Fast
☞ Good outcome likely	☞ Modest amount of information required	☞ Ideal for low-risk decisions
☞ Very time-intensive	☞ Outliers won't be considered	☞ Relies on assumptions
☞ Requires lots of information		☞ Ignores red flags

### **What does an analytical approach to decision-making look like?**

An analytical approach to making a decision involves specific steps which must be followed in order (See flow chart). It is based on decision makers gathering all possible information to consider every possible solution they can think of. Exploring every option possible in this way ensures a very thorough examination of the situation.

This approach is most useful when a decision has the potential to cause severe consequences, and therefore arriving at a decision that minimizes the risk of significant harm is of utmost importance. The analytical approach requires the decision-maker(s) to have plenty of time and information.

### **What does a risk/benefit approach to decision-making look like?**

A risk/benefit approach to decision-making generally involves the following process:

- Identify the issue or question (often, this is a “should I do X or not?” situation)
- Identify 2-3 possible actions to take
- Identify the risks and benefits of each possible action
- Make a decision and implement the solution

This approach is a good choice for situations that do not pose a significant risk OR for situations that require a decision to be made more quickly than is possible with an analytic approach. It requires less information-gathering than the analytical approach, but significantly more than the heuristic approach.

### **What does a heuristic approach to decision-making look like?**

A heuristic approach to decision-making is generally a subconscious manner of deciding what to do. Heuristics are mental shortcuts that allow our brains to make decisions based on a familiar pattern of information. When we step on the brakes in response to brake lights on the car ahead of us, when we pour just the right amount of milk in our coffee, or when we turn the gas down on a stove as the pasta water begins to bubble over the pan, we are using mental shortcuts – heuristics – to take action with minimal or no conscious thought. Heuristics free our brains to deal with unfamiliar situations or the most pressing matters quickly, but heuristics can also be the source of poor decision-making in situations of higher risk or situations where a variation from the typical pattern is not detected. This approach is a good choice for situations that pose very little threat or require immediate action.

**In the context of outdoor leadership, it is important to note that there is a physical side of decision making.** Our brain’s ability to function can be affected by conditions such as dehydration, body temperature, fatigue, and our emotional state. Perhaps the most striking illustration of the brain’s impaired ability can be seen in hypothermic individuals. The behavior of an individual suffering from hypothermia becomes confused, erratic, and apathetic. Judgment is impaired such that the victim may cast aside essential equipment, fail to put on warm clothing, disregard his or her direction of travel, and ultimately make poor decisions.

In conclusion, as outdoor leaders, our goal is to provide a group of individuals with a safe and enjoyable outing. A good leader can read the situation at hand, take sufficient time to gather

and evaluate information, consider the needs and desires of those in our group and ultimately make the best decision for the group.

## Group Management

Simply defined, a **group** is a collection of people sharing a common goal or objective. As a new leader, limiting the size of your group (10-12 people) can help you with managing groups dynamics. In some cases, a local, state or federal agency may limit the number of people in a group allowed in a certain area. In other instances, such as day hikes in heavily used parks close to major metropolitan areas, the group size may be more significantly larger. Working with a larger group offers different challenges, esp. for a new leader.

## Group Dynamics

Groups are made up of individuals, each with individual strengths, weaknesses, fears, abilities, etc. As such, individuals may have unique goals on a trip. Leaders need to communicate that, while the emotional and physical safety of all individuals in the group is foremost, each person needs to understand their personal objectives are secondary to group goal(s). Maintaining this balance can be a real art-form at times. Wherever possible a leader needs to foster cooperation and collaboration amongst their group to help avoid that conflict between self-interest and group goals. Martine Haas and Mark Mortensen spent over 15 years studying teams and groups and compiled their findings to outline how to create a climate to help diverse, groups attain high performance. Though their findings were geared toward the corporate world, they are relevant to us as outdoor leaders as well. They promote the following 5 “Enabling Conditions” – or the conditions leaders must set-up within their groups to help guide them to success (Hass & Mortensen, 2016) (Freierman, Koup, & Gilbert, "A Mountain Classroom Leadership Development Curriculum").

<i>Compelling Direction</i>	A successful group needs to have a clear, shared vision of where they are headed. Groups need to feel reasonably challenged (not to the extent that they become discouraged), and like they are working toward something meaningful and/or rewarding.	Lead trips that you are excited about and your passion will show in your leadership. This is where your trip planning and screening come into play. Planning offerings that are exciting and fun is the first step and ensuring that your participants are well-matched to the activity is a key second step.
<i>Strong Structure</i>	Everyone must understand their role within the group and feel that they are contributing meaningfully in a way that best suits their skills and traits. A group flourishes when it has an agreed upon set of values and behaviors that they are all willing to adhere to.	This can be as simple as a quick check-in at the start of the trip. When people are introducing themselves, have them state why they chose to come on the trip and what their goals are – take a moment to ensure that everyone agrees and vocalize what you see as the common objectives. On a longer trip, it can be worthwhile to write this down,

		so that it is something that can be referenced later to keep the group on track and ensure that everyone is contributing in a way that supports the mutually-accepted and intentionally-designed culture of the group
<i>Supportive Context</i>	A group needs a leader who will be there to support them. A leader can rarely offer everything a group wishes they could have, but to set a precedent of support from the get-go instills confidence in a group.	Rewarded your group for successes (through praise or meaningful feedback) Guide them through challenges by providing the resources – emotional and tangible – that they need to succeed. Encourage them to learn and grow by allowing for low-risk mistakes and taking the time to debrief after.
<i>Shared Mindset</i>	There is no room in a successful group for “us vs. them” mentality or cliques. Fostering a common identity, inclusivity and a shared mindset can bring even the most diverse groups to a more stable, high functioning state.	Treat people equally - eliminate the idea that some members of the group have knowledge or skills that others don’t which aren’t being shared as a resource to the benefit of all. Value group members’ different skills as a resource, but always with an eye to fitting them into the whole. Also, remind the group that, even when one person seems to be struggling, they still have valuable insight and traits to contribute and are therefore an important part of the group.
<i>Evaluation</i>	The last piece is on-going evaluation. Ensure that you are enabling, facilitating and creating these conditions and that they exist for your group throughout the experience.	Check-in regularly, with individuals and the group as a whole. Monitor not just for physical well-being, but also with an eye to group dynamics. Red flags to look for include waning motivation, repeated grouping or clustering of some members to the exclusion of others/isolation of one person, snide or frustrated comments, visible impatience and annoyance, etc. Step in early if you see these things developing.



## Group Life Cycle

In many ways, a small group of individuals is its own complex living entity. If its members are together long enough, a group can progress through a series of **developmental stages** or a **“life cycle,”** just like the individual human beings who comprise it. The pioneering work in group development was done by Bruce W. Tuckman who ultimately collaborated with Mary Ann Jensen. Through reviewing many studies, they determined the five stages of group development, often known as the *group life cycle* (See graphic).



It should be noted that groups may not go through the stages in sequential order (for example if new members join the group or participants leave it might set everyone back to the forming or storming stages even if they had previously moved through them). Additionally, some groups (particularly those who are only together for a short time) may not go through all these developmental stages.

As you become more accustomed to recognizing the various stages of the group life cycle, you can begin to cater your leadership style to meet the group where they are. For example, a more directive style is usually appreciated in a forming stage, whereas a performing group would often prefer a delegating style. Leaders and group members who understand this developmental life cycle are better equipped to survive the shaky and sometimes turbulent beginnings of a group and thereby reap the benefits of as the group matures into a cohesive, functional unit in the final stages.

### **Conflict Management**

Even with the most effective leadership, conflict will arise naturally whenever a group of people with different backgrounds, values, goals and habits come together. That conflict doesn't have to ruin the trip. With a skillful leader, adversity can be harnessed into a transformative aspect of your group's development (as discussed, storming almost always occurs for a group to truly reach the performing stage).

When you observe a conflict developing in your group, take steps to address it before the problem spirals out of control. Avoiding acknowledgement of the issue may seem easier, but usually just makes it worse.

If conflict arises, in your group, begin by asking the people involved if they are willing and ready to let you facilitate a conversation to seek resolution.

- If YES, set some ground rules such as:
  - No name calling;
  - Tell the truth;
  - Don't interrupt one another;
  - Confidentiality will be maintained; and
  - Speak from your own point of view rather than assigning meaning or making assumptions about other's feelings.

# CONFLICT MANAGEMENT

**1**

MAKE TIME FOR EACH SEPARATE PERSON TO VOICE THEIR SIDE. WHAT PROBLEM ARE THEY HAVING? HOW ARE THEY BEING AFFECTED? WHILE ONE PERSON IS SPEAKING, OTHERS ARE ACTIVELY LISTENING. IT IS IMPORTANT THAT EVERYONE GETS TO BE HEARD. PEOPLE SHOULDN'T FEEL RUSHED.

**2**

NOW THAT THEY HAVE HAD A CHANCE TO HEAR FROM DIFFERENT PERSPECTIVES, HAVE EACH PERSON ASSESS WHAT THEIR ROLE IN THIS CONFLICT HAS BEEN. EVERYONE SHOULD TAKE SOME OWNERSHIP FOR HOW THEY HAVE CONTRIBUTED TO THE PROBLEM.

**3**

ASK PEOPLE TO SUMMARIZE WHAT THEY THINK THE SITUATION FEELS LIKE FOR THEIR "OPPONENT." TAKING A MOMENT TO "WALK IN ANOTHER'S SHOES" CAN HELP DIFFUSE THE SITUATION AND CONFIRM THAT EACH SIDE REALLY LISTENED WHILE THE OTHER(S) SPOKE.

**4**

MAKE A PLAN FOR MOVING FORWARD TO RESOLUTION. ASK EACH PERSON WHAT THEY CAN DO HERE AND NOW TO HELP SOLVE THE PROBLEM. HELP ALL DISPUTANTS FIND A SOLUTION THEY FEEL GOOD ABOUT AND CONFIRM THAT EVERYONE AGREES TO THAT OPTION.

The more that you front-load a trip with thoughtful planning and communication about what kind of group culture is acceptable, the easier it can be to avoid or later intervene in a conflict. Match your guidance in this area to the length of the trip. On a short trip it is often best to be directive and succinct, so you may just state in your trailhead talk "On this trip the expectation is that people will stay positive, take responsibility for themselves, be respectful of each other, recognize that the group goals and tasks come first, and agree to look out for all members of the group and support each other as needed." However, on a longer trip, taking the time to make this a conversation where all members have the chance to give input may be more appropriate. In this case, you might have a note-taker who records the group's goals and expectations – as the act of writing it down alerts people to the fact that this is something that you feel is important and will want to reflect on throughout the trip.

Even with the best weather, most satisfying physical challenge, strikingly beautiful views and exciting wildlife sightings; a trip with dysfunctional group dynamics is rarely remembered as a great success. Push yourself as a leader to set an example of excellent people skills, showing genuine empathy and concern for your participants. Stay in tune with the interactions of your participants and value the success of those relationships equally as you would value the success of achieving the physical goals you've set for your group.

## Diversity, Equity & Inclusion

As leaders we must strive to create an open and welcoming environment for participants. This section will outline practices that foster equity and inclusion on trips. DEI work is fluid and dynamic. Our hope is that the following is supportive of leaders and not prescriptive. Please send us thoughts and feedback – we will continually refine this section as our own learning and awareness evolves.

### Rationale for Engaging in DEI Work

Environment: The future of our outdoor spaces is tied to engaging a new generation that is more diverse across identities.

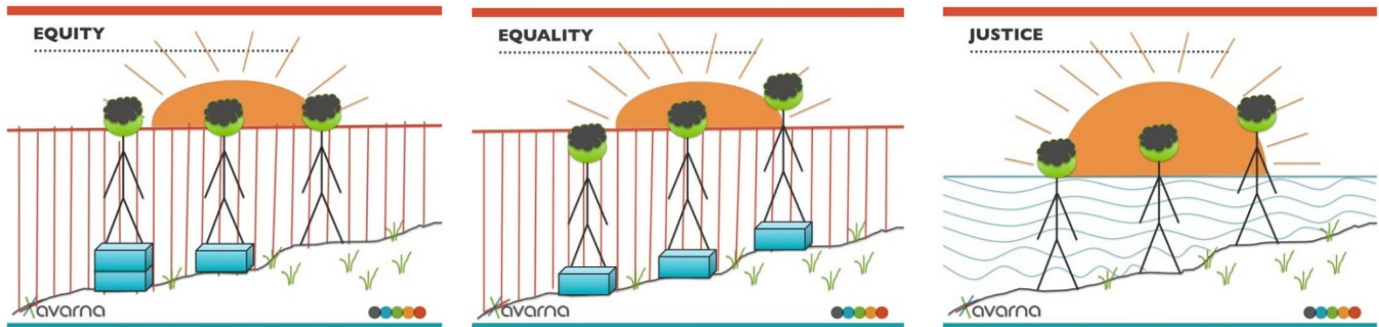
People: Staff and volunteers gain from an inclusive culture

Access: Our mission invites all people of our region to access and enjoy our outdoors; we are poised to reduce barriers that prevent people doing so.

AMC mission & Strategic Plan: With a community that better reflects our region, we will be more effective, relevant, and creative and can better achieve our mission.



[AMC's Code of Conduct](#)



### A Note on Visualizing DEI Concepts

The image series pictured on this page was created by The Avarna Group. It can be very affective and useful to people in processing some of the essential differences in these terms we are using in the larger DEI discussion. However, it is important to recognize that these are very nuanced and ever-evolving concepts which cannot fully be captured in a simple image. Efforts to visualize these ideas with images will continue to be updated and folks will continue to add more and more layers of complexity to deepen the meaning. For more information on this image series and the thinking behind it, please read the information from The Avarna Group captured [in this link](#).



## Leader Practices that Support Inclusion

*At the start of a trip:*

1. Greet everyone and facilitate introductions between members of the group. Be patient, avoid judgement, and smile! When starting a trip, your first goal is to make everyone feel welcome and cared for.
2. Make space for formal introductions: ask for people to share their name, something they enjoy outside of AMC, and offer the opportunity for folks to share their pronouns. To help encourage folks getting to know each other, consider modelling the introduction to start. After introductions, mention that if there are any sensitive concerns, folks can also find you anytime to talk about them e.g. navigating a family emergency they are dealing with, or maybe they are simply having a rough morning.

### **Example Introduction Script with Pronouns Explanation**

As we get started, we'd like to go around and share our names and personal pronouns. Sharing pronouns is a way that we can avoid assumptions, particularly about gender. What may seem obvious may be incorrect, and while many people associate with "he" or "she" as meaning men or women, respectively, this isn't always the case. This ask is not about sharing your gender or private information. We're only asking how you would like us to refer to you when we aren't using your name. For example, you may go by 'she' and 'her' pronouns or by 'he' and 'him' pronouns. Some people go by 'they' and 'them' pronouns, another set of pronouns or another way of being referred to.

For example, you can simply say something like 'Hi, I'm Lesley and I go by "he" pronouns' or 'Hi, I'm Jamie and I use the "she" series' and then turn to the next person. If you don't understand what I'm asking, or if you feel that you are uncomfortable sharing or unable to participate in a respectful way, it's okay to just share your name. If you do feel comfortable to share, let us know. Please also keep in mind that what people in this group share today is just what people are sharing today in this space and time, and that people may change their names or pronouns or go by different ones in another space. Does anyone have a question before we begin our introductions?

3. Avoid judgement if someone arrives with off brand, or well-loved equipment. Make space in the group for participants to feel comfortable communicating equipment needs before you depart – make an announcement “If you’ve forgotten or need to borrow an item on the equipment list please let me know and we’ll try and identify an extra within the group”.
4. As you head on trail, start to paddle or pedal, consider positioning yourself towards the front of the group to model a pace that will keep the group together. If you assign someone else to set the pace be close enough that you can provide feedback often. It is not a welcoming practice to assign the person with the slowest pace to be the pace setter for the group. Our goal is to call all of the group members in – not to facilitate practices that isolate them.

*During the trip:*

1. Don't make assumptions – that someone knows how to go to the bathroom outside in accordance with LNT guidelines, can swim, went to college, has a nuclear family structure, etc. Avoid alienating folks by asking open-ended questions wherever possible.
2. Try your best to use inclusive language that everyone can relate to and be open to feedback.
3. Avoid practices that facilitate “tough love” or single people out. As the Avarna Group says, “use the language of empowerment, empathy, and encouragement” (The Avarna Group, 2018).
4. Be willing and open to mess up and make mistakes. Publicly acknowledging mistakes and taking ownership of your impact can yield powerful results.
5. Don't be afraid to “call another participant in” – if you hear exclusive or offensive language offer the feedback quickly, without judgement. The inclusive culture you've worked to create requires constant maintenance!
6. Avoid any jargon that could leave someone unable to understand what you are trying to communicate or unable to engage in the conversation.

*At the end of the trip:*

1. Invite participants to engage in another activity sponsored by the AMC.
2. If anyone is interested in leader training be encouraging. Even if they currently lack what you deem to be the appropriate level of experience or training you can still be positive and steer them in the direction of resources and opportunities for development.
3. Thank everyone – a small gesture that can go a long way. Our lives are busy and when a group of strangers (sometimes) chooses to spend a day – or more together in an environment ripe with challenge it's truly a special and remarkable thing.



[AMC DEI Webinar One – Definitions \(Diversity, Equity, Inclusion, Tolerance, etc.\)](#)  
[Tips for Leaders working to Foster Inclusion during Outdoor Activities](#)  
[Avarna Group Resources](#)

## Chapter 1: Leaders and Groups– Review

Leaders should familiarize themselves with and review the following:

✓	<b>Leaders are responsible to be familiar with:</b>
	4 Leadership styles: Directing, Selling, Participating, Delegating
	Situational Leadership: ideal risk to skill ratios for various styles
	5 important elements of communication to be mindful of: Verbal, Non-Verbal, Listening Barriers, Feedback
	3 keys to effective communication; Intentional and detailed information, appropriate vocabulary, communication goes two ways
	3 Methods of decision making: Analytical, Risk/Benefit, Heuristic
	5 stages of the Group Life Cycle: Forming, Storming, Norming, Performing, Adjourning
	5 enabling conditions for successful group dynamics: Compelling direction, strong structure, supportive context, shared mindset, evaluation
	4 steps for intervening to manage conflict
	Strategies to support DEI work at AMC

### References

CMC State Safety and Leadership Committee (3/14/12). *The Colorado Mountain Club Trip Leader Manual*.

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Hass, M., & Mortensen, M. (2016, June). The secrets of great teamwork. *Harvard Business Review*, 70-76. Retrieved from <https://hbr.org/2016/06/the-secrets-of-great-teamwork>

Kelliher, A. (2021, March). AMC Leadership Approaches. *AMC Leadership Approaches Curriculum* [AMC Internal Publication Only].

## Trip Planning & Management

This chapter provides resources and guidelines to plan & execute an AMC – sponsored activity.

<b>Section I: Before Your Trip</b>	
	Routes & Trip Plans
	Activity Ratings
	<i>Resource: Trip Planning &amp; Management Flowchart</i>
	<i>Resource: Trip Planning Form</i>
	AMC Emergency Action Plan (EAP)
	Activity Database (Act DB) Style Guide
	Participant Screening
	<i>Resource: Participant Screening Form</i>
<b>Section II: During &amp; After Your Trip</b>	
	Trip Management: The Day the Trip Begins
	<i>Resource: Trail Head Talk Card</i>
	<i>Resource: Volunteer-Led Activity Acknowledgement and Assumption of Risks &amp; Release Agreement</i>
	Trip Management: During the Trip
	Trip Management: Concluding the Trip
	<i>Resource: Incident Report Form</i>
<b>Section III: Leave No Trace</b>	
	Leave No Trace

### Introduction

Because AMC members enjoy such a broad range of recreational activities, trip planning and management varies greatly throughout the club—everything from urban walks or exploring local parks, to technical whitewater kayaking. Not all of the information in the following section will apply to all activity leaders – leaders must tailor the elements of trip planning to fit their activities. If in doubt, err on the side of safety and more detailed planning.

At first, the process of trip planning and management may seem daunting. To ease those concerns, here are a few tips:

- ✓ Even if you are inexperienced in planning group activities, you most likely have experience planning a family vacation, personal trip, etc. that will help you along the way.
- ✓ Checklists are good aids for successful trip planning. This section will provide you with several checklists to help you get started.
- ✓ A good trip plan is detailed. While the amount of detail should be dictated by the complexity and risk involved with the trip, in general, the more, the better.
- ✓ To provide a substantial margin of safety, be prepared to be flexible – build alternatives into your trip so you can more easily deal with complications that may arise.



## Routes and Trip Plans

Once you have defined *what* type of trip you are going to lead and *where*, you need to develop a trip plan or itinerary (the *how*). A key component of a trip plan is route selection. **In developing your route, some factors to consider are:**

<b>Distance</b>	How far do you plan to travel? Distance will have a significant impact on the level of difficulty for your trip. Keep in mind factors like: available hours of daylight, start and end times, and how the weather may impact the route.
<b>Water</b>	Is water available? You may be able to bring all the water you need, but it is still a good idea to bring a treatment system (like iodine or a water filter) and know where you might find water on the route. On a longer trip, this is an extremely important factor. If hiking, be especially wary of long stretches above tree line.
<b>Terrain</b>	<p>What are the conditions? There are many things to consider, including: will the route be relatively flat, steep, exposed, or slippery? Identify major crossings where a pod of boaters will be exposed, or if on the ocean, the group may be exposed to tidal flux. Keep in mind the season and recent weather. Check with a local rangers' office or other local services to receive the latest information on route conditions or possible closures.</p> <p>Consider the psychological aspect of how the people in your group will interact with challenging aspects of your chosen route. Are there areas to intentionally offer additional support and directive guidance to maintain effective group cohesion and positive morale?</p> <p>Finally, assess potential environmental impacts. How can the impact of group travel be minimized whether it be by maintaining a smaller group size or being intentional about where the group is taking breaks.</p>
<b>Potential Hazards</b>	What points along the route have an associated increased risk? If you will be spending time above tree line or on open water, consider danger from lightning storms. Stream or river crossings and road crossings are also potential hazard points. The prevalence of busy urban intersections should be considered when planning road bike routes.
<b>Alternative or "Bail Out" Routes</b>	What are the potential ways you can alter your route if you run into problems? As mentioned earlier, having a substantial margin of safety and an ability to be flexible are critical in route planning. How would you change your route if there was an injury, a lightning storm, or your group pace was slower than anticipated? Are there alternative take outs if planning a water-based trip?
<b>Surprises</b>	Pleasant surprises for your participants can also be a great idea – a spectacular lunch spot with a great view or an area with interpretive signs describing the areas' history could add to the day's itinerary.

You do not necessarily need to approach the above factors in a specific order – based on your interests and your trip, certain elements of the route planning process may be more important than others.

**Once you’ve decided upon your route, additional factors to consider for your overall trip plan include:**

**Time Management**

This includes all the time related factors on your trip. What time will you tell the group to meet? When do you plan to depart the starting location? What is your turnaround time? How many hours a day will you paddle (or bike, hike, ski, etc.)?

[Create a Time Control Plan](#)  
[AMC White Mountain Guide](#)

**Emergency Action Plan (EAP)**

These are all the things you need to consider in case an emergency should occur on your activity. If you are road side and need help, you will likely call 911. However, you should also know where the nearest hospitals are in case of a minor injury. If travelling in the backcountry, you should be aware of whatever search and rescue resources are available and how to contact them. Make sure the emergency contact information on a participant’s liability waiver is legible and complete and ensure you as the leader complete it as well – if you are injured a co-leader or a participant will have your emergency contact information readily available.

**Regulations, Permits and Reservations**


You must always be aware of the regulations for your activity area. If you are camping, you may need a permit – be sure to research this early as possible so you can reserve space if needed. If you are running a trip in the White Mountain National Forest (WMNF), you’ll need an Outfitter Guide Card, which you can acquire through your Chapter.

**Food and Equipment**

Needs vary greatly depending on the trip. Make sure you plan well and provide for a “margin of safety” – emergency food that is easy to prepare, repairs kits for critical equipment, duct tape, extra fuel if you are using stoves, etc. In addition, make sure you plan for group needs in balance with individual needs and clearly communicate to participants what they are expected to bring (and NOT bring).

**Cancellation**

If there is a possibility your trip may cancel, make sure you plan for this eventuality. Have a contact list so you can get in touch with everyone. If there is any money involved, decide how and when you will refund it in advance of posting the trip. Consider group size – a four person minimum will enable you to run a backcountry evacuation with one person staying with the patient, and a two-person rescue squad able to travel out of the backcountry to seek assistance.

- [Trip Planning Form](#)
- [Trip Planning & Management Flowchart](#)
-  [Activity Difficulty Ratings](#)
- [Posting and Using the Activities Database \(ActDB\)](#)
- [Guide to Listing an Event on Meetup](#)

## Screening Participants

A goal of AMC trips is to create an inclusive and welcoming environment for people of any age, gender, race, religion, ethnicity, ability, sexual orientation, or socioeconomic status. Some AMC programs are designed for a specific population, or topic. However, **any** person who meets the minimum qualifications (skills, experience, and fitness level) established by a trip leader(s) for an activity is eligible to attend, if space is available.

**Remember: A well-planned trip and well-prepared participants make for an enjoyable and safer experience for all. Effective screening can do much to ensure this happens.**

Effective screening will not eliminate all problems that might occur during a trip, it can go a long way to minimize risk proactively before a trip.

The primary goal of screening is to match a participant and their experience with the physical and emotional demands of a trip. During your initial contact with a prospective participant, you have the opportunity to explain trip expectations (equipment, clothing, and cost) as well as establish clear expectations for the group. Another purpose of screening is to limit group size. Certain locations have regulations on the maximum number of people traveling and/or camping together.

The following checklist can be used to screen participants for outdoor trips. The difficulty level of the trip will determine which questions to ask. After obtaining these answers, you may decide whether a trip is beyond a person's skill level, within it, or too elementary. If a person wishes to participate in trip that is too easy for him or her, that decision is the participant's. It can be helpful to emphasize, in that situation, the trip is geared toward a different audience with less experience.

Restating this information helps you, as a leader, to proactively manage expectations.

**4 SIMPLE STEPS TO  
PREPARE  
FOR  
SCREENING**

Begin setting a positive leadership tone by implementing the following tips to screen participants before your trip!



**1 BE READY FOR A PHONE CALL**  
Communicate best times to call in your trip posting.



**2 HAVE YOUR CHECKLIST READY!**  
Know what questions and information you want to communicate to participants before the phone rings.



**3 PREPARE ALTERNATIVES**  
Have a general awareness of other trip offerings. If you judge an interested participant to be over or under-qualified for the activity you are leading you can offer an alternative better suited to their success.



**4 CONTINUE**  
Phone screening is the first step. Continue planned communications with participants up until the trip start. Arrival and equipment check offer additional opportunities for screening.



**REMEMBER**  
SCREENING CAN BE CHALLENGING! CALL OR EMAIL US FOR HELP.

If a person wants to go on a trip that is beyond his/her ability, it is the leaders' decision. For an advanced trip, it is best not to accept someone you do not know until you have a chance to check the individual's references – you'll touch base with participants from past trips as well other leaders.

If, following screening you assess a potential participant to not have the foundation of experience to participate, it is the leaders' responsibility to recommend a different trip. Be objective and deliver direct feedback outlining the experience the participant will need to gain to participate in the advertised trip in the future. Offer support in working towards this goal; for example, other trips that will allow the participant to build their experience level or trainings offered by the chapter or AMC. Positive encouragement and support goes a long way – don't hang up the phone without encouraging the individual to try a less advanced trip to increase their skill level. If a person's equipment is incomplete or inadequate, you may require them to borrow or purchase the proper gear, for their personal comfort and safety and that of the group.

If a person qualifies for a trip, mention the requirements, such as deadline for deposit, cancellation policy, length of trip, where and when to meet and what type of snack or food to bring. State you will begin the trip promptly. Indicate how long you, and the group, will wait, after the start time, at the meeting location for any remaining participants to arrive.



[Participant Screening Form](#)

## Trip Management

### The day the trip begins:

1. Review the weather early enough to cancel, if necessary;
2. Have list of participants meeting at designated meeting spot; and
3. Arrive on time or EARLY at the meeting place to inspire some confidence in your participants.



[Trip Talk Card for Any Trip](#)  
[Volunteer-Led Acknowledgement and Assumption of Risks & Release Agreement](#)

### At the meeting spot:

1. Check in participants as they arrive. Have them sign the AMC Volunteer Release Agreement. Know who has a vehicle, the location of vehicle keys, if there is gas in the vehicle(s), etc.
2. Review equipment, especially critical items, including food and water. If you are leading an extended trip, this process is especially important. For example, for a backpacking trip, make sure stoves work, all tents have poles and rainfly covers, etc. If someone is unprepared and/or has inadequate equipment, you will need to either provide that individual with adequate gear, or ask him or her not to participate.

3. Set a positive tone for the group. Facilitate introductions between participants. Remind everyone they need to watch out for each other. One's individual welfare is inseparable from that of the group.
4. Outline the trip plan. Make sure everyone is familiar with the pace, destination, timetable, etc. Tell people what's going on!
5. Review the goals and expectations of your activity, making sure everyone understands AMC's priorities: (1) to maintain the safety of the group, (2) have a good time, and *then* (3) achieve the trip's highlighted objective (i.e., reach a specific summit).
6. Review any rules applicable to your activity. On a hiking trip, this may mean staying together and stopping at trail junctions or other potentially confusing points; on a biking trip, this may mean wearing helmets and obeying traffic laws, etc.
7. Assign lead and sweep responsibilities. When assigning roles, consider what role may fit your participants best. For example, the participant with the most leisurely pace may volunteer to sweep so they aren't holding the group back. This can cause the slinky effect if the sweep falls far behind the group. It is recommended designated sweeps are experienced hikers, have knowledge of the route, carry a first-aid kit, and know how to use it! Don't be afraid to make adjustments to these roles as the trip progresses and you see how the group dynamic unfolds.

### **On the Trip**

1. Set a reasonable pace. A group moves efficiently at a pace that allows everyone to keep up and minimizes long stops and fast starts. Allow terrain and conditions to dictate the pace and establish a speed the group can sustain over time. (i.e., think tortoise, not hare!)
2. Avoid the "slinky effect"—i.e., the fastest member of the group moves quickly to the next stopping point, waits for the slowest member, and then takes off as soon as that person arrives. In that situation, the fastest member gets many breaks while the slowest gets none. Try to keep members of the group engaged with one another and hiking together.
3. Stay together. Resources and knowledge are maximized when a group is together:
  - Maintain visual contact with the person in front of and behind you;
  - Assemble at junctions or other potentially confusing points; and
  - If pace is a challenge take a more directive role in modelling an appropriate group pace that keeps all participants within sight and sound of the person in front of, and behind them.
4. Watch the weather.
5. Be mindful of what is going on within the group. If someone is having a problem, address the issue early and encourage everyone else in the group to do the same. If someone is getting "hot spots," stop immediately for blister prevention, if someone with a very efficient forward paddle stroke is having a hard time staying with the pod offer them a job like navigation, etc.
6. Keep the lines of communication open. Discuss changes to the day's plan, share revisions with the group, and keep everyone on the same page. Remember, it's okay not to know everything – a good answer when you're unsure is just that, and invite participants into your decision making process so they can learn from you and the experience.

7. Be willing to turn around. Start by having a turnaround time based on the amount of daylight, weather conditions, the group's abilities and anything else you know about the chosen route. When these factors change, you must also change. The desire of a group to reach an objective often does not accurately reflect the situation. Pay attention to facts rather than emotions and always have a plan B in mind.
8. Be aware of your surroundings, bail-out routes and alternatives.
9. Take decisive action in an emergency.
10. Offer teachable moments that bring awareness to environmental sensitivity.
11. Have a group first aid kit and make sure everyone knows where it is located.

#### **Concluding the trip:**

1. Account for all members of the group.
2. Make sure everyone has transportation.
3. Sign out at point of registration (if possible).
4. Return, sort or collect equipment.
5. Provide trip closure, a brief good-bye, and congratulations to everyone.
6. Determine if group is meeting down the road for a post trip gathering.
7. Review trip with the co-leader and trip members (if you choose).
8. Complete a trip report (if required)



[Incident Report Form](#)

## **Leave No Trace & Backcountry Ethics**

Wildlands attract us for many meaningful reasons. For some, they possess the beauty, mystery, serenity, and tranquility we often lack in our day-to-day lives and landscapes. For others, they represent the true meaning of “wild”—untamed, untouched, and untraveled. For most of us, however, the wildlands we travel to are not areas where none have traveled before us—they are instead filled with well-traveled trails, rivers, and campsites many have used before us, and may even be within the boundaries of a state or national park or forest.

While the wilderness may seem rugged and permanent, it is an inherently fragile environment that has evolved over thousands of years. Ecosystems can be drastically altered in just minutes. And while the impact of one or two visitors may be minimal, the impact of several thousand visitors a year can be devastating for these fragile environments. Some would say we are “loving our wilderness to death” and if our practices don’t change, we will destroy much of the natural wilderness we love to experience. Specialized ecological processes can take many years to complete, especially in fragile environments, like those found above tree line, but can be undone in moments by the careless actions of outdoor enthusiasts.


Outdoor recreation can be the cause of many detrimental environmental impacts that we unknowingly contribute to while we “experience” the wilderness. Because humans have already drastically altered so much of the world’s wildlands, it is increasingly important we learn about backcountry ethics and specific minimal-impact travel skills. The knowledge and deep understanding of the importance of backcountry ethics and minimal impact skills the AMC promotes is essential for all our outdoor leaders. As a leader, it is also your responsibility to share this knowledge with group members so they too recognize the potential impact of their actions.

When you prepare to take a group into the wilderness, you must take into consideration [Leave No Trace \(LNT\)](#) practices and techniques.

The AMC maintains a partnership with the Leave No Trace Center for Outdoor Ethics and is one of the organizations which teaches LNT Trainer and Master courses. For further training in LNT, more information about these courses can be found on [AMC’s website](#).

For now, familiarize yourself with the tenants of group use by familiarizing yourself with the following brochure.

If you’re interested, here are several deeper dives into the world of LNT:

-  [LNT Guidelines for Group Use](#)
- [Research on Leave No Trace Findings and Applications](#)
- [The Science Behind the Principles](#)
- [North America Skills & Ethics Booklet](#)

**Chapter 2: Trip Planning & Management – Review**

Leaders should familiarize themselves with and review the following:

✓	<b>Leaders are responsible to be familiar with:</b>
	Routes & trip planning
	Best practices for screening potential participants
	Starting, managing & concluding an AMC sponsored activity
	Trip paperwork
	Incident paperwork
	AMC guidelines for Leave No Trace

## Backcountry Leadership Skills

This chapter provides suggestions and guidelines for managing environmental concerns and medical incidents in a backcountry setting.

<b>Section I: Weather</b>	
	Wind
	Lightning
<b>Section II: Wilderness First Aid</b>	
	Hypothermia
	Hyperthermia
	Mosquitoes & Ticks
	First Aid Kits
	Incident Documentation

### Weather

Weather plays a critical role in any outdoor activity. Knowing the weather forecast and preparing your group accordingly helps you minimize risk & make an activity more enjoyable for all.

Even with modern technology, forecasts can be inaccurate, especially in the mountains. Ensure you prepare for the worst possible conditions that may occur at a given time of year.



*Make sure participants know how to find out if you have canceled a trip, in case of inclement weather.*

Northeast weather can change dramatically in a relatively brief time. Because of this, one must **always** be prepared! **Extra insulating layers, rain gear and wind protection are a must any time of the year.** Effective wind protection mitigates the cooling effects of wind chill. On the next page is a wind chill chart. The chart demonstrates the dramatic impact of wind on temperature.



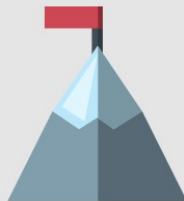
# 5 SIMPLE WEATHER RULES

to help you mitigate risk



## 1 MOUNTAINS OFTEN MAKE THEIR OWN WEATHER

Mountains are a barrier to wind. Mountains funnel wind into valleys or forces it up & over peaks & ridges. If the wind goes over the mountain, its speed increases, the air cools and moisture may begin to condense.



## 2 THE HIGHER YOU GO, THE COOLER IT GETS

As noted by Bisson & Hannon (2017), "A hiker climbing a mountain will notice the temperature dropping about 3.5 degrees for every 1,000 feet of elevation gain."



## 3 CHANGE IN BAROMETRIC PRESSURE = CHANGE IN WEATHER

Generally, falling barometric pressure indicates bad weather is on the way & rising barometric pressure suggests improving conditions.



## 4 FRONTS BRING BAD WEATHER

A front is the collision of two (or more) air masses. Cold fronts move quickly (up to 35 mph), and can produce rapid & dramatic storms with towering thunderheads (cumulonimbus clouds). Warm fronts typically produce high, thin clouds (cirrus) and will take a longer time to clear.



## 5 BE AN AMATEUR METEOROLOGIST: NOTICE WEATHER CHANGES THROUGHOUT THE DAY

Notice the clouds: Shape, size and changes throughout the day. Wind: Direction and strength. Time of year: What type of precipitation, if any, is likely? If storms occur, at what time of day are they most likely? Unusual circumstances: Are there any special weather considerations, like Nor'easters, that you should take into account?

CREATED BY KRISTI HOBSON EDMONSTON

# Wind

Wind Chill Chart:

		Temperature (F)																		
		Calm	40	35	30	25	20	15	10	5	0	-5	-10	-15	-20	-25	-30	-35	-40	-45
W i n d  S p e e d	M P H	5	36	31	25	19	13	7	1	-5	-11	-16	-22	-28	-34	-40	-46	-52	-57	-63
		10	34	27	21	15	9	3	-4	-10	-16	-22	-28	-35	-41	-47	-53	-59	-66	-72
		15	32	25	19	13	6	0	-7	-13	-19	-26	-32	-39	-45	-51	-58	-64	-71	-77
		20	30	24	17	11	4	-2	-9	-15	-22	-29	-35	-42	-48	-55	-61	-68	-74	-81
		25	29	23	16	9	3	-4	-11	-17	-24	-31	-37	-44	-51	-58	-64	-71	-78	-84
		30	28	22	15	8	1	-5	-12	-19	-26	-33	-39	-46	-53	-60	-67	-73	-80	-87
		35	28	21	14	7	0	-7	-14	-21	-27	-34	-41	-48	-55	-62	-69	-76	-82	-89
		40	27	20	13	6	-1	-8	-15	-22	-29	-36	-43	-50	-57	-64	-71	-78	-84	-91
		45	26	19	12	5	-2	-9	-16	-23	-30	-37	-44	-51	-58	-65	-72	-79	-86	-93
		50	26	19	12	4	-3	-10	-17	-24	-31	-38	-45	-52	-60	-67	-74	-81	-88	-95
55	25	18	11	4	-3	-11	-18	-25	-32	-39	-46	-54	-61	-68	-75	-82	-89	-97		
60	25	17	10	3	-4	-11	-19	-26	-33	-40	-48	-55	-62	-69	-76	-84	-91	-98		

Frostbite occurs in less than 30 minutes

National Oceanic and Atmospheric Administration. (2000/2001). [Graph illustration of revised wind chill chart]. Retrieved from <https://www.weather.gov/safety/cold-wind-chill-chart>.

When talking about wind direction & speed in the Northeast of the United States, this old weather saying may prove helpful:

*Wind from the west brings weather that's best.  
 Wind from the north brings cold weather forth.  
 Wind from the south brings rain in its mouth.  
 Wind from the east bring weather not fit for man nor beast.*

(Bisson & Hannon, 2017)

For those of you who participate in paddle sports, you may be more familiar with following chart:

**Beaufort Wind Scale: Developed in 1805 by Sir Francis Beaufort, U.K. Royal Navy**

Force	Wind (Knots)	WMO Classification	Appearance of Wind Effects	
			On the Water	On Land
0	Less than 1	Calm	Sea surface smooth and mirror-like	Calm, smoke rises vertically
1	1-3	Light Air	Scaly ripples, no foam crests	Smoke drift indicates wind direction, still wind vanes
2	4-6	Light Breeze	Small wavelets, crests glassy, no breaking	Wind felt on face, leaves rustle, vanes begin to move
3	7-10	Gentle Breeze	Large wavelets, crests begin to break, scattered whitecaps	Leaves and small twigs constantly moving, light flags extended
4	11-16	Moderate Breeze	Small waves 1-4 ft. becoming longer, numerous whitecaps	Dust, leaves, and loose paper lifted, small tree branches move
5	17-21	Fresh Breeze	Moderate waves 4-8 ft taking longer form, many whitecaps, some spray	Small trees in leaf begin to sway
6	22-27	Strong Breeze	Larger waves 8-13 ft, whitecaps common, more spray	Larger tree branches moving, whistling in wires
7	28-33	Near Gale	Sea heaps up, waves 13-19 ft, white foam streaks off breakers	Whole trees moving, resistance felt walking against wind
8	34-40	Gale	Moderately high (18-25 ft) waves of greater length, edges of crests begin to break into spindrift, foam blown in streaks	Twigs breaking off trees, generally impedes progress
9	41-47	Strong Gale	High waves (23-32 ft), sea begins to roll, dense streaks of foam, spray may reduce visibility	Slight structural damage occurs, slate blows off roofs
10	48-55	Storm	Very high waves (29-41 ft) with overhanging crests, sea white with densely blown foam, heavy rolling, lowered visibility	Seldom experienced on land, trees broken or uprooted, "considerable structural damage"
11	56-63	Violent Storm	Exceptionally high (37-52 ft) waves, foam patches cover sea, visibility more reduced	
12	64+	Hurricane	Air filled with foam, waves over 45 ft, sea completely white with driving spray, visibility greatly reduced	

National Oceanic and Atmospheric Administration. (2018). [Graph illustration of Beaufort wind chart]. Retrieved from <https://www.spc.noaa.gov/faq/tornado/beaufort.html>.

Proficiency in weather forecasting comes with practice. Get a cloud and wind chart, use a compass to determine wind direction changes, and keep your eye on the elements. In addition to being practical, it can be fun to share these tools and knowledge with participants.



- [Appalachian Mountain Club](#)
- [Mt. Washington Observatory](#)
- [National Oceanic and Atmospheric Association](#)
- [The Weather Channel](#)
- [Weather Underground](#)

## Lightning



### FRONTCOUNTRY LIGHTNING RISK MANAGEMENT

No place outside is safe from lightning. Frontcountry includes outdoor settings that are within a 30-minute walk of modern buildings or vehicles. This is where most lightning injuries occur because this is where people spend more time outdoors.

#### TAKE THESE SIMPLE PRECAUTIONS TO STAY MUCH SAFER FROM THE LIGHTNING HAZARD:

- Get in a modern, enclosed building or a metal-topped vehicle if you hear thunder. Look up "Faraday cage" to see why this is so helpful and why the vehicle needs a metal roof to protect you.
- Avoid open shelters (like gazebos) and tall trees.
- Time your visits to high-risk areas with local weather patterns, so you aren't in a high-risk area at a high-risk time.



### WEBSITES ABOUT LIGHTNING

- National Weather Service Lightning Safety:** [www.lightningsafety.noaa.gov](http://www.lightningsafety.noaa.gov)
- NOLS Backcountry Lightning Risk Management:** [www.nols.edu/lightning](http://www.nols.edu/lightning)
- Medical Aspects of Lightning:** [www.uic.edu/labs/lightninginjury](http://www.uic.edu/labs/lightninginjury)
- Lightning Safety for Boaters:** [www.wrh.noaa.gov/vef/boatersafety.php#lightning](http://www.wrh.noaa.gov/vef/boatersafety.php#lightning)
- Youtube keywords for waiting for the storm to pass:** (use wireless devices) lightning strike tree, car, or plane; Faraday cage; lightning on the lawn



## HOW LIGHTNING HURTS US

A lightning strike in a crowded stadium is hazardous out to roughly 50 feet from the strike point, with one or two fatalities and dozens of injuries. People are occasionally injured 100 feet away from a strike. This is roughly equivalent to the kill radius and injury radius of a hand grenade. The mechanisms that hurt us are the millions of volts of electricity, the heat, and the thunderous blast from the rapidly expanding air.

**Ground current** occurs with each strike. You can minimize your exposure to ground current by keeping your feet close together, especially avoiding lying flat on the ground. Ground current contributes to half of lightning fatalities (Fig. 1). This is the primary mechanism where we can easily reduce lightning risks.

**Side flash** jumps from tall objects like trees when they are struck by lightning, so don't seek shelter near tall trees, other tall objects, or tall vertical surfaces.

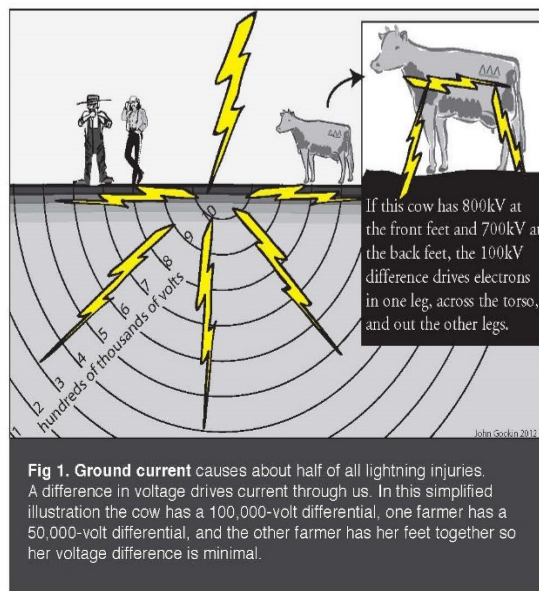
**Contact** is from touching long conductors like railings, cables, and fences. Conduct a web search for *dead cow lightning* to see morbid images of contact and sideflash.

**Upward leaders** emanate from high ground and tall objects when downward leaders approach the ground; even if they don't connect with a downward leader, they can be fatal.

**Direct strikes** cause about 3-5 percent of lightning fatalities. Avoid high places and open ground to decrease risk of a direct strike.

The explosive force of lightning can cause **blunt trauma** resulting in fractures or soft tissue injuries.

We should primarily focus our efforts on avoiding ground current and side flash.



## HOW LIGHTNING KILLS

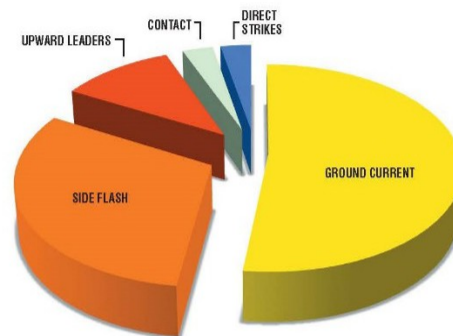


Fig 2. The frequencies of the primary lightning fatality mechanisms.

## FIRST AID FOR LIGHTNING VICTIMS



The mechanisms that hurt us are electricity, heat, and the air blast. These cause many different kinds of neurological problems, burns, and trauma.

### TREATMENT PRINCIPLES

**Scene Safety:** Avoid further injuries. It may be safer to wait for the storm to pass before treating victims in extremely hazardous locations.

**Basic Life Support:** Be prepared to provide rescue breathing.

**Triage:** Unlike normal triage protocols, attend first to those who are in cardiac or respiratory arrest without obvious lethal injury.

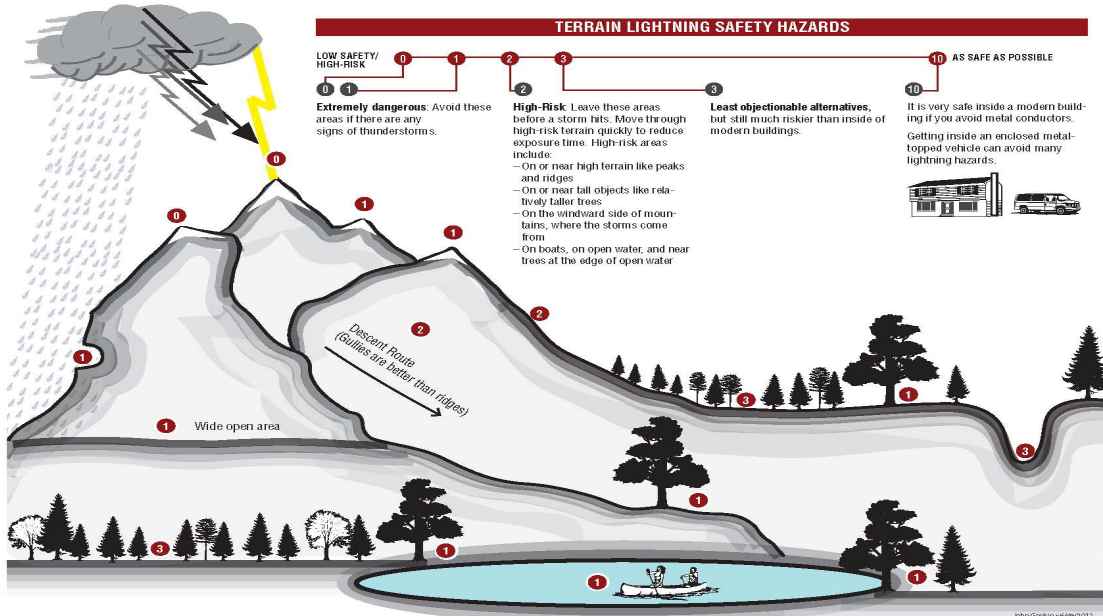
**Assessment:** All patients require a complete body survey and careful evaluation for head, spinal, long bone, or cardiac injuries. Assess peripheral pulses, and sensory and motor status. Check the skin for small hidden burns.

**Monitor** for cardiovascular, respiratory, and neurological problems.

**Evacuate** anyone obviously injured by lightning. Be alert for lingering issues that need further evaluation and treatment. Survivors could be disoriented or confused. Their decision-making ability (including judgment, direction finding, and planning) could be dangerously impaired.

# BACKCOUNTRY LIGHTNING RISK MANAGEMENT

No place outdoors is safe from lightning. Lightning is an objective hazard. Your behavior can reduce the risk of that hazard harming you.



## REDUCING LIGHTNING RISK IN THE BACKCOUNTRY

**Backcountry settings** are at least a 30-minute walk from the nearest vehicles or modern buildings, where you can easily find safe shelter. There are four actions that can reduce your lightning risk in the backcountry, but none of them can make you as safe as getting in a modern building or a metal-topped vehicle. These behaviors are listed in order, and each is roughly twice as important as the next.

### 1. TIME YOUR VISITS TO HIGH-RISK AREAS WITH LOCAL WEATHER PATTERNS.

**Timing activities** with safe weather requires knowledge of both typical and recent local weather patterns. There is no such thing as a *surprise* or *freak* storm. You must set turnaround times that will get you off of exposed terrain before storms arrive. You need to observe the changing weather and discuss its status with your group. If you have logistical delays, you may need to change your plan rather than summiting a peak or crossing open ground during a thunderstorm. Begin your turnaround if you hear thunder (which means lightning is less than 10 miles away).

### 2. FIND SAFER TERRAIN IF YOU HEAR THUNDER.

**Safer terrain** in the backcountry can decrease your chances of being struck. Lightning tends to hit high points and the surrounding terrain. Avoid peaks, ridges, and significantly higher ground during an electrical storm. If you have a choice, descend a mountain on the side that has no clouds over it, since strikes tend to be less frequent on that side until the clouds move over it. Once you get down to low, rolling terrain, strikes are so random you shouldn't worry about terrain as much. Move to safer terrain as soon as you hear thunder, not when the storm is upon you.

**Select tent sites** that may reduce your chances of being struck or affected by ground current. If you are in a tent in "safer terrain" and you hear thunder, you at least need to be in the lightning position. Lying flat increases the risk of injury by ground current.

If your tent is in a more dangerous location, such as on a ridge, in a broad open area, or near a tall tree, you must exit the tent and get to safer terrain before the storm arrives, and stay there until it has passed.

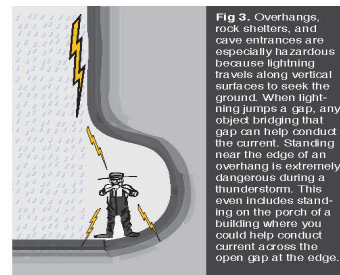
**Gently rolling hills,** lower flat areas are not safer than the higher flat areas because none of the gentle terrain attracts leaders. Strikes are random in this terrain. Look for a dry ravine or other significant depression to reduce risk.

The flash-bang ranging system measures how far away a thunderstorm is, but sometimes it is impossible to tell which flash is associated with which bang. The flash of light travels fast enough that it is virtually instantaneous. The sound travels a mile every five seconds (1km/3 sec) so ideally you just count the number of seconds between the obvious flash and the obvious bang, and divide by five to determine how many miles away the storm is. Divide the time by three to see how many kilometers distant the storm is. Do not stake your life on the reliability of this ranging system.

### 3. AVOID TREES AND LONG CONDUCTORS ONCE LIGHTNING GETS CLOSE.

**Wide open ground** offers high exposure to lightning. Avoid trees and bushes that rise above others, since the highest objects tend to generate upward leaders. Your best bet is to look for an obvious ravine or depression before the storm hits, then spread out your group at 20 foot (7m) intervals to reduce the risk of multiple injuries. Assume the lightning position.

**Cavers** (Fig. 3) should avoid cave entrances during thunderstorms. Small overhangs can allow arcs to cross the gap. Natural caves that go far into the ground can be struck, either via the entrance or through the ground. People have been shocked standing in water half a mile inside caves. If you are caving near an entrance during electrical activity, don't stand in water, avoid metal conductors like ladders, cables, and railings, and avoid bridging the gap between ceiling and floor.

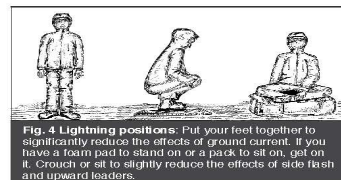


**Fig. 3.** Overhangs, rock shelters, and cave entrances are especially hazardous because lightning travels along vertical surfaces to seek the ground. When lightning jumps a gap, any object bridging that gap can help conduct the current. Standing near the edge of an overhang is extremely dangerous during a thunderstorm. This even includes standing on the porch of a building where you could help conduct current across the open gap at the edge.

**Boaters** need to start getting off the water long before a storm arrives. Avoid tall trees near the edge of the water.

### 4. GET IN THE LIGHTNING POSITION IF LIGHTNING IS STRIKING NEARBY AND YOU CAN'T GET TO SAFER TERRAIN.

The lightning position (Fig. 4) is for waiting out storms in stationary situations when it is impractical to move to a safer location. It is important to reduce your overall footprint on the ground (Fig. 1).



**Fig. 4** Lightning positions: Put your feet together to significantly reduce the effects of ground current. If you have a foam pad to stand on or a pack to sit on, put on it. Crouch or sit to slightly reduce the effects of side flash and upward leaders.



# Environmental Injuries

## Hypothermia

Hypothermia—the lowering of one’s internal body temperature—is the number one cause of accidents and deaths in the backcountry. We are warm-blooded animals and we require a constant body temperature for our survival. The lowering of normal body temperature from 98.6F to 96F can make a backpacker confused or disoriented and severe hypothermia can be fatal. *Early identification* and *prompt action* are key to preventing significant problems.

### Prevention:

- Control **convection**: Wear wind and rain gear to prevent wind from transporting heat away from you.
- Control **evaporation**: Sweating leads to a wet body and a wet body can quickly become a cold body. Avoid wearing too many layers, overheating and sweating through clothing. Modify group pace during cold weather travel to prevent sweating.
- Control **radiation**: Prevent your body from radiating its heat to the surrounding air. Insulate yourself with special consideration given to the extremities (head, neck, hands, feet). Large quantities of heat are lost from unprotected areas of the body. A hat is an easy item to add/remove during active pursuits.
- Control **conduction**: Eliminate the transfer of body heat to heat sucking objects around you. Avoid sitting or sleeping on the ground unless you are on an insulating pad.



Hypothermia can occur in all four seasons. **It is 100% preventable and 100% treatable if recognized in time.**

**HYPOTHERMIA**  
In other words:  
a **COLD** person

SEVERE: Below 91F (33C)*	TREATMENT
<b>SIGNS/SYMPTOMS INCLUDE:</b> <ul style="list-style-type: none"><li>• Inability to stand/walk</li><li>• Decreased level of consciousness/unconscious</li><li>• NOT shivering</li><li>• Below 86F, a person may appear to be dead due to decreased pulse &amp; respiration rate</li></ul> <b>* LIFE-THREATENING SITUATION!</b>	<ul style="list-style-type: none"><li>• Eliminate further heat loss</li><li>• Shelter ("burrito wrap") and external heat sources</li><li>• EVACUATION</li></ul>

MODERATE: 91-94F (33-34C)	TREATMENT
<b>SIGNS/SYMPTOMS INCLUDE:</b> <ul style="list-style-type: none"><li>• Uncontrollable shivering</li><li>• Confusion/decreased level of consciousness</li><li>• Mumbling</li><li>• Lethargy</li></ul>	<ul style="list-style-type: none"><li>• Warm and/or dry clothing</li><li>• Nutrition</li><li>• Hydration</li><li>• External heat sources to groin, armpit, and carotid area of the neck</li><li>• Shelter</li></ul>

MILD: 94F-96F (34-35C)	TREATMENT
<b>SIGNS/SYMPTOMS INCLUDE:</b> <ul style="list-style-type: none"><li>• Shivering</li><li>• Fumbling (For example, unable to put on gloves or close zippers)</li><li>• Fatigue</li><li>• Mild confusion or lethargy</li><li>• Irritable!</li></ul>	<ul style="list-style-type: none"><li>• Get the person moving to generate heat</li><li>• Warm and/or dry clothing</li><li>• Nutrition</li><li>• Hydration</li></ul>

**Disclaimer:** This information is provided as a general resource. The AMC recommends all outdoor leaders take a Wilderness First Aid (WFA) course to learn how to recognize & treat common health issues.

INFORMATION CONDENSED FROM BISSON & HANNON (2017)

# HYPERTHERMIA

In other words:

a



person

## HEAT EXHAUSTION SIGNS/SYMPTOMS INCLUDE:

- Fatigue
- Nausea
- Dizziness

## TREATMENT

- Place person in cool, shaded area
- Replenish water and electrolytes

## HEAT STROKE - SEVERE: SIGNS/SYMPTOMS INCLUDE:

\* LIFE-THREATENING SITUATION!

- Body temp of 104F (40C)+
- Disoriented, combative - progressing toward unconsciousness

## TREATMENT

- Remove from heat & sun
- Cool IMMEDIATELY!
- Replenish water and electrolytes
- EVACUATION

**Disclaimer:** This information is provided as a general resource. The AMC recommends all outdoor leaders take a Wilderness First Aid (WFA) course to learn how to recognize & treat common health issues.

INFORMATION CONDENSED FROM BISSON & HANNON (2017) .

## Hyperthermia

Hyperthermia is the opposite of hypothermia. It occurs when the core body temperature rises and can result in death. Remember, the body likes to maintain a constant body temperature around 98.6F (37C). Our bodies do a better job rebounding from being too cold than too hot.

### Primary causes include:

- **Dehydration:** According to Bisson & Hannon (2017), a “hiker with an active sweat response can lose up to three quarts of fluid every hour.”
- **Exertion:** Physical activity in very warm/hot temperatures; and
- **The Environment:** Air temps greater than 90°F drastically reduce the body’s ability to shed heat through radiation. Normally, 65% of heat loss occurs through radiation. Relative humidity above 75% drastically reduces the body’s ability to release heat through perspiration (sweat doesn’t evaporate off the skin). Normally 20% of heat loss occurs due to sweating (Kosseff 1998).

### Prevention:

- **Drink water:** The best prevention for dehydration is consistently drinking water throughout the day. Water is the recommended source of fluid. It is the easiest for the body to absorb. Salty

snacks and/or a drink mix, like Gatorade, can also help mitigate the effects of salt loss.

- **Rest:** To minimize the effects of the heat and/or humidity, and to allow for rehydration along the way.
- **Shade:** Take advantage of any shade available. This can include advising participants to wear hats, or setting up a tarp to provide shade during longer breaks.



**Hyperthermia is 100% preventable and 100% treatable if recognized in time.**



## Mosquitoes & Ticks

There are many insects that share the outdoors with us. Those of us recreating in the New England and mid-Atlantic states frequently encounter mosquitoes & ticks.

### Prevention:

<p><b>CLOTHING</b></p>	<ul style="list-style-type: none"> <li>• Long pants &amp; shirts when traveling through tall grasses and leaf litter. A bug net for the head can also be effective against mosquitoes.</li> <li>• Light colors – khaki, beige or olive – make it easier to spot ticks or other insects.</li> <li>• Consider treating clothing (and gear) with Permethrin. <b>DO NOT USE PERMETHRIN ON SKIN.</b></li> </ul>
<p><b>SKIN</b></p>	<ul style="list-style-type: none"> <li>• Use insect repellent. DEET (with a concentration of 30% or less) and Picaridin are common &amp; effective options. Avoid eyes, mouth and hands and wash off the repellent as soon as possible.</li> <li>• For Ticks: Always conduct a tick check after being outdoors – at the end of an activity OR every 12 hours for longer trips. This should a full body check <u>AND</u> inspecting gear &amp; clothing. Ticks like to hitch a ride on these items.</li> </ul>

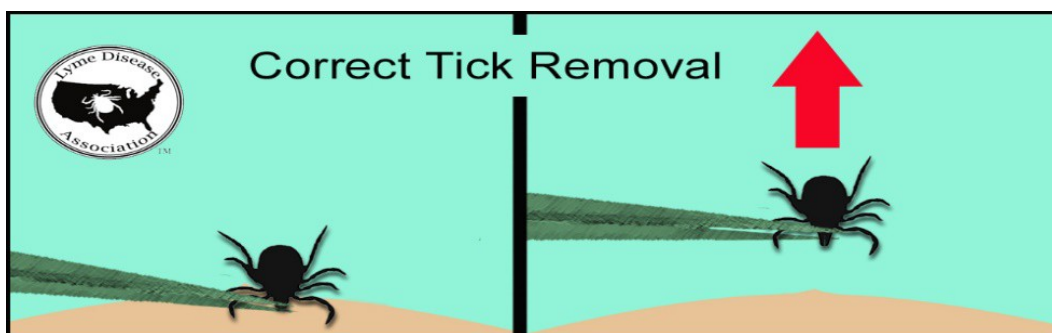
### “OH NO! I FOUND AN EMBEDDED TICK!!”

Despite your best efforts at tick prevention, it’s possible you may still find an embedded tick.



### If you find a tick, then:

- Using fine-pointed tweezers, grasp the tick firmly (but without crushing it) as close to the head as possible. Then pull straight up, away from the skin.



Lyme Disease Association, Inc. (2018). [Graph illustration of tick removal]. Retrieved from <https://www.lymediseaseassociation.org/about-lyme/prevention-tick-removal/tick-removal>.

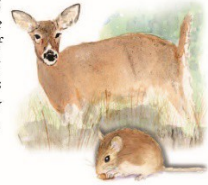
- After removing the tick, wash the area with warm water and soap. Alcohol can also be used to clean the area around the bite.
- Monitor for area for any signs of a rash.

# TICKS: TINY SEPTIC TANKS THAT CAN MAKE YOU SICK AND CAN EVEN KILL

## PREVENTION is the key

**AVOID CONTACT** with the tick populations by staying away from the wooded and brushy areas that ticks call home. Woodlands, fields, and the brushy edges between them are prime habitat for some of the common hosts for the ticks that carry disease.

White-tailed deer are the main carriers of Lyme Disease; small rodents carry other diseases.



**deer tick**  
Female (under magnifying glass), male (right); black dots represent life stages at actual size: larvae, nymph, and adult (all are dangerous)



**TICK PROOF YOUR YARD**  
**Discourage** animals with fencing, minimize food sources (compost).  
**Remove** leaf litter and other loose vegetation.  
**Store** firewood in a dry area to discourage rodents and their ticks.  
**Create** a barrier—a 3-foot strip of gravel or wood chips works well.  
**Keep** your lawn short—long grass is favorite tick habitat.  
**Clear** brush and tall grass—garden borders, field and woods edges.  
**Remove** trash and rubbish, or store it in a garage or outbuilding.  
**Apply** pesticides that kill ticks (acaricides) in early May and again in early June; you may need an exterminator.

**WEAR THE RIGHT STUFF:** long-sleeved shirts, long pants with the cuffs tucked into your socks, shoes instead of sandals. Several manufacturers make clothing pre-treated with insecticides such as permethrin.

**CHECK YOURSELF** when you come inside: remove your clothes and check for ticks. Wash your clothes and dry in a hot dryer (which kills ticks).

**REPEL AND KILL**  
**DEET** for skin—apply every 1 – 2 hours)  
**PERMETHRIN** for clothing—it can provide several days of protection, even if laundered or worn in the rain (it does not adhere to skin); turn pants inside out and apply from knee to cuff. Safe for humans and dogs; can kill cats.

**GET THE TICK OUT** as fast as possible  
**Use fine-tipped tweezers** and grasp as close to the skin as possible.  
**Pull up and out** with steady, even pressure.  
**Don't squeeze** or twist—it may leave the head in or squeeze disease into the wound.  
**Clean** the site and your hands with rubbing alcohol, iodine, or soapy water.  
**Dispose** of the tick (e.g., submerge in alcohol).  
**Avoid** folklore remedies to make the tick detach (e.g., painting with nail polish).  
**See your doctor** for an embedded deer tick—you may need doxycycline.

*The goal is to make it really hard for the ticks to find your skin; and if they do, to kill or remove them fast!*

**LYME DISEASE**—it's nasty and it's spreading. The Centers For Disease Control (CDC) estimates 300,000 new cases of the disease in the US annually, most occurring in the Northeast and upper Midwest. Prevention is key: if the tiny ticks are removed within 24 hours, infection is highly unlikely.

*Classic Lyme Disease sign: bullseye rash—it doesn't always appear.*

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 This information available as a free poster from our website



## Lyme Disease: Signs & Symptoms

A tick must be engorged in the skin for 36-48 hours before it is able to transmit Lyme disease. After transmission, a common first sign is a “bull’s eye” rash—a circular rash that can expand over the course of several days, sometimes to the width of 12 inches. According to the CDC (2015), this rash occurs in 70-80% of Lyme disease victims. The other symptoms of Lyme disease include: chills, fever, joint pain, headache, fatigue, and swollen lymph nodes.

Lyme disease is often successfully treated with antibiotics. An individual with undiagnosed Lyme disease may have more severe and systemic symptoms such as shooting pains, stiff muscles, and irregular heartbeats.



As a leader, especially on multi-day trips, it’s important to remind folks to perform tick checks and share the above signs & symptoms with them in case of a tick bite.



[Centers for Disease Control and Prevention](#)  
[Submit a Tick for Identification](#)  
[Stonehearth Open Learning Opportunities \(SOLO\)](#)  
[Tick Encounter Resource Center](#)  
[U.S. Environmental Protection Agency](#)

## Wilderness First Aid

This handbook is not designed to cover all aspects of first aid and accident management. Anyone venturing away from the 911 safety net should pursue training in wilderness first aid.

Wilderness First Aid (WFA) is the most basic level of training and is generally taught as a 2-day (16 hours) course. Wilderness First Responder (WFR) is generally accepted as the minimum training for professional outdoor leaders and is 8-10 days in length (80 hours). Wilderness Emergency Medical Technician (WEMT) is the most rigorous training. WEMT courses move beyond standard first aid and focus on systematic response to emergency situations in a backcountry setting. Role playing scenarios are emphasized in all nationally available wilderness first aid trainings.

To locate courses, search the listings in [AMC's Activity Database](#) by selecting "First Aid" from the Activity drop down menu, and "AMC Staff" from the Group/Chapter drop down menu.

Additional options may be found by searching Stonehearth Open Learning Opportunities, Wilderness Medical Associates, or NOLS Wilderness Medicine.

## First Aid Kits



Every individual engaged in an outdoor activity should carry a small, personal first aid kit. One person in every group, typically the leader, should carry a group first aid kit.

DO'S	DON'TS
DO put items in your first aid kit that have multiple uses OR items you can't improvise from gear in the field.	DON'T carry items you don't know how to use.
DO carry a "cheat sheet" or small book on wilderness first aid. It never hurts to have an additional resource.	DON'T think there is perfect first aid kit. There is <i>always</i> a compromise re: space, weight and cost. Your first aid kit will evolve over time.
DO carry a pen and small notebook. Remember: your writing utensil needs to work in all sorts of weather.	DON'T forget to inventory your first aid kit before & after each trip.
DO use a durable stuff sack, fanny pack or other indestructible container.	DON'T forget to check expiration dates & replace expired medications. Label medications.
DO keep a checklist of supplies in your first aid kit. Make sure you've waterproofed those supplies	DON'T think you need to buy a pre-made first aid kit at an outdoor retailer.



## Incident Documentation



If an incident occurs on an AMC trip, there are several documents that need to be filled out either during or after the incident. The AMC recommends you keep several copies of each in your first aid kit during AMC trips.



### [Patient Care Form](#)

This form is the AMC version of the SOAP note used by all emergency response teams. You can use the AMC version or another version familiar to you. You should document any treatment provided to an individual. This form prompts rescuers to perform a head to toe survey, take vital signs, etc. and can serve as an important tool during the stress of responding to an incident.



### [Volunteer Incident Report Form](#)

This form **must** be filled out by a trip leader whenever an incident occurs on an AMC trip when:

- The incident involves the use of outside agencies (police, hospital, emergency response, search and rescue, etc.)
- The participant involved in the incident receives professional medical care (to the knowledge of the Leader), professional medical care is recommended by the Leader, or the participant refuses the offer or recommendation of professional medical care
- The incident involves potentially life-threatening or disability injuries or in the case of a fatality



**The leader may file an incident report under other circumstances at their discretion, including concerns relating to adherence to the AMC's Code of Conduct.**

The Incident Report Form asks relevant questions regarding an injury/illness as well as about factors which may have contributed to an incident. This form should be submitted to the AMC's Director of Risk Management as soon as possible after an incident. The AMC is aware accidents occur on AMC trips. This form is not intended to bring a trip leader's decisions into question. Its primary use is to collect club-wide incident data in order to identify trends and improve risk management practices in the future.



### [Crisis Communication Chart](#)

**As a trip leader, you should use the communication chart in case of a large-scale emergency (i.e., a fatality, a large-scale rescue, etc.). This chart contains a toll-free 800 number (800/217-7975) which can be used to reach AMC staff.**



Chapter 3 Review:

✓	<b>Leaders are responsible for becoming familiar with the following:</b>
	Rules of Weather (5)
	Effects of Wind
	Lightning: Reducing risk in the backcountry
	Hypothermia: Signs, symptoms & treatment
	Hyperthermia: Signs, symptoms& treatment
	Prevention tips: Mosquitoes & Ticks, including: ➤ Tick removal
	First Aid Kits
	Incident Documentation, including: ➤ Patient Care Form ➤ Incident Report ➤ Crisis Communication Chart
	Frequently Asked Questions (FAQs)

References:

AMC Boston Chapter Fall Leadership Training Committee (n.d.) Weather. *AMC Outdoor Leadership Handbook*.

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National Oceanic and Atmospheric Administration. (2018). [Graph illustration of Beaufort wind chart]. Retrieved from <https://www.spc.noaa.gov/faq/tornado/beaufort.html>

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Silver, Jonathan (1998). *Principles of Wilderness First Aid Kits, Emergency Management*.

Stonehearth Open Learning Opportunities. (2018). Tick poster. Retrieved from [https://www.soloschools.com/wp-content/uploads/2018/02/tick\\_poster\\_June\\_15.pdf](https://www.soloschools.com/wp-content/uploads/2018/02/tick_poster_June_15.pdf).

## Policies & Procedures: An Appendix of Important Documents

This chapter provides resources detailing policies and procedures that support leaders at AMC.

<b>Section I: Policy</b>	
	Leadership Requirements & Guidelines
	AMC Leader Crosswalk
	Leader Liability FAQ's
	Assumption of Risks & Release FAQ's
	Trip Policy
	AMC Code of Conduct
	Sexual Harassment Policy
	Conflict of Interest Policy
	Youth Protection
	Inclusion Statement
	Essential Eligibility Criteria
	Activity Difficulty Rating
	Service Animals
	AMC Chainsaw Policy
<b>Section II: Paperwork Appendix</b>	
	Volunteer-Led Activity Acknowledgement and Assumption of Risks & Release Agreement
	Volunteer-Led Camps & Cabins Acknowledgement and Assumption of Risks & Release Agreement
	Adventure Travel Acknowledgement and Assumption of Risks & Release Agreement
	Photo Waiver
	Incident Report Form
	Patient Care Form
	Participant Screening Form
	Emergency Action Plan (EAP)



## Leadership Requirements and Guidelines

### **Outdoor Leadership Development Committee**

Originally Issued by OLDC on April 24<sup>th</sup>, 2004 &  
Approved by Board of Directors on May 6<sup>th</sup>, 2004  
**Revised January 18, 2022**  
**Effective March 15, 2022**

The Outdoor Leadership Development Committee (OLDC) is an organization-wide committee composed of Appalachian Mountain Club (AMC) volunteers and staff representing a variety of Club Units. The OLDC was formed with the task of developing, publishing, monitoring, and modifying requirements and guidelines for the volunteer Leaders of the AMC and the groups that recruit, train, and sponsor those Leaders. The overarching goal of the OLDC in creating and maintaining these requirements and guidelines is to further the enjoyment of AMC's members and the public through ensuring that physical and emotional safety, quality, and cultivating belonging are priorities on all AMC volunteer-led Activities.

This document will be formally reviewed by the OLDC beginning three years after the most recent effective date. Additional reviews and changes may be made as necessary outside of the triennial revision process. The OLDC welcomes questions, comments, and feedback regarding this document at [leadership@outdoors.org](mailto:leadership@outdoors.org).

### **Contents**

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<b>Requirements for Club Units</b>	<b>3</b>
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## Introduction and Definitions

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This document establishes requirements and guidelines for volunteer units of the Appalachian Mountain Club (AMC) and for its Leaders. Requirements, guidelines, and several other important terms used throughout this document are defined here:

- **Requirements** are the minimum standards that must be met by all Club Units and Leaders. Club Units may impose additional requirements appropriate to their Activities and must not waive any requirement in this document without the permission of the OLDC. Failure of any individual to meet these requirements may result in loss of coverage by the AMC's general liability insurance policy.
- **Guidelines** are further standards that must be met by all Club Units and Leaders except where it is not possible or in the best interests of Activity participants to do so. Such exceptions may be because of the nature of the Activity or situations arising while the Activity is in progress. Excluding those instances, Leaders must always meet these guidelines to maintain high standards of quality Activity leadership.
- A **Club Unit** is any official volunteer committee of the AMC. This includes each chapter (e.g., Western Massachusetts, Boston, Connecticut), committees within the chapters (e.g., Delaware Valley Backpacking Committee, Maine Conservation Committee), club-wide committees (e.g., Adventure Travel, Inter-chapter Paddling Committee) and Volunteer-led Camps and Cabins (e.g., August Camp Committee, Fire Island Committee).
- A **Leader** is any person authorized by a Club Unit to lead or assist in the leadership of an AMC Activity. A Leader in good standing is a person regarded as having complied with all their explicit obligations, while not being subject to any form of sanction, suspension, or disciplinary censure.
- An **Activity** is any outing, trip, event, etc. sponsored by a Club Unit. For an Activity to be an official AMC Activity, it must exist according to the qualifications set forth in this document. Social events, meetings, basic services and meals (e.g., potluck dinners, picnics, barbecues, cocktail hours, slide shows, speaker presentations, facility stays, equipment rental) are exempt from the requirements and guidelines of this document.
- The **Outdoor Leadership Development Committee** (OLDC) is a group chartered by AMC's Board of Directors to assist the AMC in developing requirements and guidelines for high quality volunteer-led Activities. Requests for changes or amendments to this document should be submitted to the OLDC at [leadership@outdoors.org](mailto:leadership@outdoors.org).

In all instances, the AMC places the well-being of Activity participants first, regardless of the requirements and guidelines listed in this document.

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## Liability Insurance Coverage

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The AMC maintains a general liability insurance policy insuring the Club and its Leaders against damages arising out of acts of authorized persons in furtherance of official Club Activities. The liability policy includes coverage for defense costs.

- To be personally covered by AMC's liability insurance policy Leaders must be current AMC members acting in accordance with the requirements set forth in this document and they must be leading an approved AMC Activity as set forth in the section "Requirements for Activities."
- Other persons who are appointed by the designated Leader(s) to perform an assistant Leader function(s) (sub-group leader, registrar, lead, sweep, first aid care provider) are also covered, whether these Leaders are AMC members or not.
- Persons or businesses that an AMC member-Leader contracts with or hires as a third party, to provide expertise, facilities, transportation, services, or equipment for an activity, are NOT COVERED by the AMC liability insurance. Anyone hired as a third party should have adequate insurance. In addition, Leaders who contract privately with a third party to take over leadership or instructional roles must obtain a certificate of insurance from the third party with the AMC listed as a named insured, although in some instances this may not be feasible for overseas Activities.

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## Requirements for Club Units

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These requirements are the minimum standards that shall be met by all Club Units. Club Units may impose additional requirements appropriate to their Activities and may not waive any requirement in this document without the permission of the OLDC.

### Approval of Activities

- Club Units must designate one or more persons for the purpose of approving Activities sponsored by that Club Unit.
- Club Units sponsoring Activities involving outside organizations must ensure that the jointly sponsored activity meets the standards of the sponsoring Club Unit and has an approved AMC Leader.
- Club Units must ensure that the Activities they sponsor are led by one or more individuals approved as Leaders for that Activity.
- If a Club Unit sponsors activities that require Leaders to collect money from participants, Leaders must follow rules as outlined in their Club Unit's Financial Policies. When there is a conflict, AMC policies as set by the organization's Chief Financial Officer (CFO) take precedence over Club Unit. This policy may or may not include reimbursing Leaders for Activity expenses and/or providing for free activities for Leaders. This policy must NOT include any compensation for Leaders BEYOND direct reimbursement for activity expenses and/or a free Activity. Club Units are authorized to charge service fees to Activity participants to reimburse the Club Unit for the costs of providing Activities. As necessary, these services may include expenses such as advertising, printing, postage, training, equipment provided, etc.
- Club Units may sponsor the following Activities:

Camping, backpacking, hiking, walking, trail running, bicycling, canoeing, kayaking, rafting, fishing, trail maintenance and construction, equipment maintenance, facility maintenance and construction, stewardship projects, conservation activities, ice climbing, mountaineering, rock climbing, leadership and/or outdoor skills training, orienteering, recreational team sports, social and educational activities, dancing, yoga or other organized exercise classes, cooking, in-line skating, ice skating, sailing (boats 26 feet and under only), snow skiing, snowshoeing, snowboarding, sledding, dog sledding, swimming, snorkeling, windsurfing, and stand up paddleboarding (SUP).

Additional activities may be sponsored (e.g., horseback riding, caving), but are first subject to approval by the OLDC, the insurance carrier, and the Risk Management Department.

- Club Units must not sponsor the following activities:
  - SCUBA diving, sailing (boats over 26 feet), bungee jumping, flying of any kind including skydiving, hang gliding, parasailing, and parapenting.
- Club Units are authorized to approve activities within the fields of expertise of their approved Leaders, if the Activity does not require travel to any location greater than 500 miles from **any** Chapter's region or exceed 10 days in duration. Activities more than 500 miles from the AMC region or longer than 10 days are classified as Adventure Travel and must be approved by the Adventure Travel Committee.

### Leadership

- A Club Unit must establish leadership qualification criteria for the Activities it sponsors. These criteria must include at least one of the following: (a) successful completion of any AMC sponsored leadership training meeting the guidelines described below, as determined by the trainers or facilitators; (b) demonstration of leadership skills developed inside or outside the AMC (e.g., previous leadership experience, co-leads with experienced Leaders, etc.). The sponsoring Club Unit may require additional criteria.

- Club Units must make reasonable efforts to solicit feedback from Leaders, Activity participants, and other persons. A transparent system must support the review and follow up communication with both the person submitting and the individual receiving the feedback.
- A Club Unit must publish its leadership qualification criteria and other leadership requirements in a manner easily accessible to existing and prospective leaders including a publicly accessible means of contact.
- The sponsoring Club Unit must make reasonable efforts to ensure that all Leaders possess the requisite interpersonal and technical skills for the Activity that it approves through the Club Unit's established leadership qualification criteria or by additional means.
- According to its established criteria, a sponsoring Club Unit must grant, change, or rescind leadership status for those persons leading Activities that fall within the purview of that Club Unit. At its discretion, a sponsoring Club Unit may rescind or limit the leadership status of an individual in response to code of conduct violations, and/or a failure to exercise situationally appropriate leadership skills that affect the physical or emotional safety of participants during Activities. Once an individual's leadership status has been rescinded in this manner, the Club Unit must immediately report this information to the Leader and to the OLDC via the Leadership Training Department at 10 City Square, Boston, MA 02129 or leadership@outdoors.org.
- A sponsoring Club Unit must maintain a roster of its qualified Leaders, including name, phone number and email, in the Activities Database (ActDB). This roster must be maintained and kept up to date.
- Before approving an Activity, the person designated by the Club Unit must verify the Activity listing meets all requirements as referenced in the *Approval of Activities* section above.
- In the event of a reportable accident or incident (described below in *Requirements for Leaders*), the volunteers involved (e.g., Activity Leader(s), sponsoring activity committee chair(s), camp trip coordinator, chapter chair, and regional director) must cooperate with the Leadership Training and/or Risk Management Departments in providing background information and reports regarding the event as may be requested by the Club's legal counsel or the Appalachian Mountain Club. Those directly involved with the event must refer inquiries to the AMC for an official statement by the organization and must not give statements to the press, make public statements, or post information related to the incident to social media outlets.

Club Units must develop a process to manage complaints, disputes and issues related to their operations. Criteria which could result in a conflict, dispute or incident shifting from management at the local Club Unit level to a Club-wide committee include:

- Illegal acts or allegations of illegal acts
- Police actions
- Circumstances involving allegations of discrimination based on any protected class
- Circumstances or incidents involving litigation or threats of litigation, and
- Issues or conflicts with the potential to have a significant detrimental impact on the AMC's reputation.

If a dispute cannot be resolved at the Club Unit level, the dispute will be elevated for review by the AMC Volunteer Resolution Committee.

### **Training**

One of the major responsibilities of Club Units is to develop new Leaders and enhance the skills of existing Leaders by offering opportunities for leadership training. Leadership training must cover the following topics in a manner and detail appropriate to the types of Activities the Leader will be approved to lead.

#### **Required Elements of Leadership Training:**

- Activity planning and management

- Screening of potential participants for an Activity
- Risk management & leader liability, including AMC's Leadership Requirements & Guidelines
- Leadership approaches (formerly styles)
- People skills including group dynamics, interpersonal communication, and feedback
- AMC Emergency Action Plan (EAP) and accident scene management
- Leave No Trace & Conservation
- Diversity, equity, and inclusion (DEI)

Whenever AMC, through its Center for Outdoor Learning and Leadership, develops learning objectives and/or content standards for a particular element of leadership training, sponsoring Club Units must ensure that any leadership training offered will meet those learning objectives and content standards, regardless of the method of instruction. Also, whenever AMC through its Center for Outdoor Learning and Leadership, establishes standards for facilitators delivering elements of leadership training, Club Units must ensure that those elements of leadership training are delivered by facilitators meeting those standards.

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### **Requirements for Leaders**

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These requirements are the minimum standards that must be met by all Leaders. Club Units may impose additional requirements appropriate to their Activities but must not waive any requirement in this document without the permission of the OLDC. Failure of any individual to meet these requirements may result in loss of coverage by the AMC's general liability insurance policy.

#### **Basic Requirements**

- Leaders must be eighteen (18) years of age or older.
- Leaders must maintain current AMC membership.
- When leading an Activity that requires collection of money from participants, Leaders must follow the financial policy of the sponsoring Club Unit.
- Leaders must make reasonable efforts to ensure that their Activity meets the *Requirements for Activities* as described below and must not conduct any Activity that they know does not meet such requirements.
- Leaders must know and follow all leadership requirements of the Club Unit that sponsors their Activity.
- Leaders must make a reasonable, good faith effort to secure all permits and adhere to all laws and regulations.
- Leaders must remain in good standing.

#### **Participants and Activity Management**

- Leaders may not exclude persons from an Activity based on membership status, any protected class, gender identity or expression.
- The participant is required to sign an approved AMC release when participating in an officially sanctioned AMC activity.
- Leaders must notify all participants that there is an element of risk in the Activity using one of the following release documents in their approved formats:
  - Acknowledgement and Assumption of Risks & Release Agreement for AMC Volunteer-Led Activities
  - AMC Volunteer-Led Adventure Travel Acknowledgement and Assumption of Risks & Release and Indemnity Agreement

- AMC Volunteer-led Camps and Cabins (VCC) Acknowledgement and Assumption of Risks & Release and Indemnity Agreement.
- Leaders must keep track of the number of participants in the group and account for all participants at the conclusion of the Activity.
- When co-sponsoring an activity with an outside organization, it is the responsibility of the Leader to identify the responsibilities and services provided by each organization (emergency response, participant screening, etc.). Leaders must inform participants of the nature of the co-sponsored arrangement and the specific responsibilities as well (this information should be included in the trip listing or a pre-trip briefing).
- If, during any Activity, an accident or incident occurs that meets any of the following criteria, the Leader must file a Volunteer Incident Report Form as soon as practicable with the sponsoring Club Unit and with the Risk Management Department. Accidents and incidents requiring reporting are as follows:
  - Incident response involves the use of outside agencies (e.g., police, hospital, emergency response, and search and rescue).
  - The participant involved in the incident receives professional medical care (to the knowledge of the Leader), professional medical care is recommended by the Leader, or the participant refuses the offer or recommendation of professional medical care.
  - In cases involving potentially life threatening or disabling injuries or in the case of a fatality, the Leadership and Risk Management Department or other staff at AMC headquarters (800-217-7975) must be contacted as soon as the situation reasonably permits. For more information on contacting AMC staff in the event of an emergency, please refer to the AMC Chapter Crisis Communication Chart.
  - A Leader may file an incident report under other circumstances at their discretion, including concerns relating to adherence to the Code of Conduct. In addition, leaders and participants are encouraged to report potential violations of AMC's Code of Conduct to [codeofconduct@outdoors.org](mailto:codeofconduct@outdoors.org). A Leader should consider the emotional and physical welfare of any participants involved in the incident, their attitudes towards the incident, and any potential for future complaints or lawsuits.

## Equipment

- Leaders must check that all participants are equipped with Activity-appropriate safety equipment and that it is used at all appropriate times.
  - On all outdoor rock climbing, ice climbing, bicycling and in-line skating activities, helmets appropriate to the Activity must be worn during participation by all Leaders and participants.
  - A paddling Activity Leader may require helmets on any Activity. Helmets must be worn by Leaders and participants while open boating on Class III or higher rapids, while closed boating on Class II or higher rapids, and while rafting in all rapids.
  - Personal floatation devices (PFDs) must be always worn when paddling Activity Leaders or participants are on the water except for flat-water boating Activities. On flat water boating Activities PFDs must be always present for all Leaders and participants in their boat.
  - Trail work requires safety precautions beyond that of a recreational hike and use of appropriate Personal Protective Equipment (PPE). The leader is required to determine the PPE or other equipment necessary for each project, and that it is used consistently and correctly by participants.
- Leaders must refuse participation to individuals not equipped with the safety equipment listed above or any other Activity-appropriate safety equipment reasonably deemed necessary for the safe participation in the Activity by either the Leader or the sponsoring Club Unit.
- Leaders must make reasonable efforts to ensure that appropriate safety and first aid equipment is available during their Activity.

## Accident Scene Management

In case of accident or injury, the Leader or their designee must decide on an appropriate course of action to manage the accident scene.

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### Guidelines for Leaders

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Guidelines are further standards that must be met by all Club Units and Leaders except where it is not possible or in the best interests of Activity participants to do so. Such exceptions may be because of the nature of the Activity or situations arising while the Activity is in progress. Excluding those instances, Leaders must always meet these guidelines to maintain high standards of quality Activity leadership.

Leaders must consider the safety and well-being (both physical and emotional) of the participants to be more important than the goal or the completion of the Activity and always be prepared to cancel the Activity, change plans, or turn back upon the recognition of unreasonable or unacceptable risks.

### Training and Preparedness

- In addition to any training required by sponsoring Club Units, Leaders are encouraged to attend AMC or other outdoor leadership training and associated courses, such as skill enhancement, appropriate first aid, lifesaving, and CPR.
- Leaders must have a technical skill level that comfortably exceeds that required for the difficulty of the Activity that they are leading.
- If Leaders are unfamiliar with the area in which their Activity will take place, they must familiarize themselves in advance of the Activity (e.g., by studying trail guides, river guides or maps, talking with others, or scouting the area).

### Communication

- When a trip is posted in the Activities Database the following information must be included:
  - Detail of the trip objectives including a description of the type of Activity
  - Geographic location
  - Duration
  - Level of difficulty, including required training, experience, and prerequisites
  - Required equipment, and
  - Cancellation policies & procedures.
- Leaders must use the AMC Activity Rating System to enable prospective participants to determine whether the Activity is appropriate for them.
- Leaders must communicate the meeting time and location to approved Activity participants with adequate notice.
- Leaders must communicate the Activity plan, guidelines, and safety procedures to the participants before the Activity begins and keep participants informed of any changes in plan.
- Leaders must encourage participants to inform the Leader of any changes in their ability or willingness to continue with the Activity and try to observe behavior or other factors that might indicate possible issues whether or not participants directly inform the Leader of these issues.
- Leaders must strive to be complete, concise, and clear in all communications to participants.

## Participants and Group Management

- Throughout the Activity, Leaders must attempt to facilitate positive group interactions and to make sure that new people are introduced and welcomed into the group.
- Applicants/participants may be excluded due to inadequate qualifications or experience, insufficient skill, inadequate equipment, capacity limitations, previously demonstrated personal incompatibility, unsafe actions, refusal to share group work or objectives, or inappropriate behavior. Minors (under age 18) may be excluded for any of the above reasons and must be accompanied by a responsible adult. See *Requirements for Leaders* for the AMC's non-discrimination policy.
- Screening participants can be a challenging and complex undertaking. Leaders with difficulties or questions regarding this issue, or an individual participant, are encouraged to contact the chair of their sponsoring Activity committee, the chair of their volunteer Club Unit, or the Risk Management Department (603-466-8054).
- Leaders must encourage participant conduct consistent with Leave No Trace environmental and conservation principles and local regulations.
- Leaders must not require anyone to attempt any element of the Activity that is beyond their ability.
- Leaders must encourage respectful behavior by all persons participating in the Activity and be prepared to intervene if they observe or are told of any behavior inconsistent with AMC's Code of Conduct.

## Activity Management

- If the Leader is unable to participate, a qualified replacement Leader must be found according to the policy of the sponsoring Club Unit. If a qualified replacement Leader cannot be found, the Activity must be canceled, and participants notified.
- Leaders must carry appropriate information resources, such as guidebooks, maps, etc. as applicable, including supplemental information resources to be used if the Activity plan must be modified.
- Leaders must designate sufficient assistant Leaders, for duties such as lead, sweep, sub-group leader, or others, to make reasonable efforts to minimize participant risk.
- Leaders must designate only persons as assistant Leaders who have the skills required for the tasks assigned.
- Leaders must set and maintain a pace appropriate for the group and consistent with the description of the Activity. There may be times where a slower pace is necessary, especially if the current pace is compromising group management. In the interest of safety, Leaders are encouraged to keep the group together.
- There may be times when it is advisable to divide large groups into smaller, independent sub-groups or to restrict the number of participants for the Activity. Factors that should be considered include: regulations or suggestions regarding group size; type of Activity and size of the group that the Leader team can manage safely and effectively; impact on the environment; and impact on the other persons' outdoor experience.

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## Requirements for Activities

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The following requirements must be met for an Activity to be considered an official Activity of the Appalachian Mountain Club and ensure coverage under AMC's general liability insurance policy.

- Activities sponsored and conducted by any unit of the Appalachian Mountain Club shall be in support of and consistent with the mission of the organization.
- Activities must be approved by persons designated for that purpose by the sponsoring Club Unit.

All Activities must be approved through the Activities Database (ActDB) by its established approval processes. After an Activity has been approved, it may be announced or publicized to the public as derived from or referencing an approved Activity listed on the Activities Database.

One exception to the trip posting parameters as outlined above:

- Postings – Events such as Fall Hiking Week and Fall Gathering, and Volunteer-led Camps and Cabins (VCC) facilities generally post a list at the beginning of each week, or other time, of their approved Activities scheduled for that period.

Please direct all questions or concerns to the AMC Leadership Training Department at [leadership@outdoors.org](mailto:leadership@outdoors.org).



## **AMC Leader Crosswalk: How to maintain your leadership status across chapters**

List of Signers for Memorandum of Understanding on recognizing leadership training

Updated May 19, 2016

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Berkshire Chapter  
Connecticut Chapter  
Delaware Valley Chapter  
Maine Chapter  
Mohawk Hudson Chapter  
Narragansett Chapter  
New Hampshire Chapter Paddling Committee  
New Hampshire Chapter Cycling Committee  
New York North Jersey Chapter  
Potomac Chapter  
Southeast Massachusetts Chapter  
Worcester Chapter

New Hampshire Chapter Committee by Committee Information:

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**March 23, 2016**

### **SKI**

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Trip leaders of other AMC NH committee or other AMC chapters who want to join the leadership group, will be assessed on a case-by-case basis. In most cases, they will be required to attend leadership class and participate in 3 mentored ski trips.

### **PADDLING—Signed the MOU**

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#### **BIKE—Bike Committee Proposal for Admitting Bike Leaders From Other AMC Chapters:**

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Generally, the NH Chapter Bike Committee welcomes the idea of bike leaders from other AMC Chapters joining the NH Chapter in the same role. However, we do feel it is necessary to determine the incoming leader's prior training and experience, this could be done through conversation with whomever currently trains NH Chapter bike leaders.

If, the level of training or experience leading seems lacking, then the incoming leader should be given the same training that a new bike leader currently receives.

### **EXCURSIONS**

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#### **Pathway to become a NH Chapter Excursions Leader for AMC Hike**

##### **Leaders from other Chapters:**

Below is a summary only. Please refer to the Handbook and contact one of the AMC NH Excursions Co-Chairs.

##### **Class 1 Leader**

1. Hike 24 of the 48 4K's (or equivalent peaks) in calendar winter
2. Participate in five NH Chapter activities (Hikes, Mountaineering, Skiing, and/or Cardigan weekend school)
3. Attend NH led, weekend Leadership Training Workshop offered at Cardigan Lodge in either January, February or April
4. Conduct three mentored hikes to three different 4K's in calendar winter

##### **Class 2 Leader**

1. Hike 24 of the 48 4K's (or equivalent peaks) in any season
2. Participate in five NH Chapter activities (Hikes, Mountaineering, Skiing, and/or Cardigan weekend school)
3. Attend NH-led, weekend Leadership Training Workshop offered at Cardigan Lodge in either January, February or April

4. Conduct three mentored hikes to three different 4K's in the three seasons (non-calendar winter or winter-like conditions).

### **Class 3 Leader**

1. Hike 24 peaks from the approved list (or equivalent peaks; refer to the handbook)
2. Participate in five NH Chapter activities (Hikes, Mountaineering, Skiing, and/or Cardigan weekend school)
3. To lead in winter, attend NH led, weekend Leadership Training Workshop offered at Cardigan Lodge in either January, February or April; to lead in three-season conditions, attend the one-day Class 3 training
4. Conduct three mentored hikes in calendar winter or three season as Warranted

## **Mountaineering**

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### **Trip Leader / Instructor Requirements**

#### **Trip Leader for Rock/Ice**

- ✓ Be a member in good standing with the AMC
- ✓ Have several years of outdoor rock/ice climbing experience
- ✓ Climb at least 5.6 (Top Rope) outdoors for rock; Climb at least WI 3 (Top Rope) for ice
- ✓ Have successfully completed Top Rope Site Management (TRSM) Training (or the equivalent)
- ✓ Have successfully completed the mentor program with good recommendations from the climbing mentors
- ✓ Demonstrate a desire to assist and inspire less experienced climbers
- ✓ WFA certification (training level appropriate to the trip parameters) is desirable
- ✓ AMC NH Chapter Excursions Committee Leadership Course offered at Winter or Spring Schools (or equivalent) is desirable

#### **Instructor for Glacier Travel & Crevasse Rescue**

- ✓ Be a member in good standing with the AMC
- ✓ Have 3 years of relevant mountain travel experience
- ✓ Have glacier travel training or prior experience
- ✓ Have successfully completed the instructors training session (or the equivalent)
- ✓ Have successfully completed Top Rope Site Management (TRSM) Training (or the equivalent)
- ✓ Adept in multiple disciplines (ice climbing, skiing, etc.) is desirable
- ✓ Demonstrate willingness to contribute to the improvement of the program
- ✓ WFA certification (training level appropriate to the trip parameters) is desirable
- ✓ AMC NH Chapter Excursions Committee Leadership Course offered at Winter or Spring Schools (or equivalent) is desirable

#### **Waiver Provisions**

- ✓ TRSM is optional for leader applicants who have a current AMGA SPI certification (or better)
- ✓ The first mentored trip is optional for leader applicants who have a current AMGA SPI certification (or better) or are already an approved leader for another AMC Chapter Committee
- ✓ If a mountaineering trip leader from another AMC Chapter is interested to become a NH Chapter Mountaineering Leader, the candidate shall demonstrate equivalent or better training than what is offered by AMC NH Mountaineering. Each situation will be considered on a case by case basis and the candidate will have to meet all criteria established above for Mountaineering leadership.
- ✓ WFA re-certification recommended every 2 years
- ✓ TRSM re-certification recommended every 3 years

## Trails Committee

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### **Guidelines for Qualifying Leaders from Other AMC Chapters**

This document specifies a path to become an AMC-NH Chapter Trails Committee leader for someone who leads trailwork trips for an AMC chapter other than the New Hampshire Chapter.

#### **GENERAL REQUIREMENTS**

Trips led by AMC-NH Trails Committee leaders are essentially hiking trips with extra activities included. The NH Trails Committee requires that all our leaders are also leaders for the AMC-NH Excursions Committee. They may lead trailwork trips only within their qualifications as defined by Excursions Committee standards for trip leaders. That is, if a leader may only lead hikes to lower mountains in non-winter conditions, trailwork trips may only reach lower elevations in non-winter conditions.

In addition, Trails Committee leaders must have taken, and be currently certified in a wilderness medicine course approved by an AMC-NH chapter committee. Such a certification will likely be Wilderness First Aid taught by SOLO.

#### **SPECIFIC REQUIREMENTS**

The AMC-NH Trails Committee recognizes two broad categories of trailwork leaders, *Qualified Leaders* and *Active Leaders*. There is no *Master Leader* category at this time. One must be a Qualified Leader in order to lead trailwork trips; an Active Leader is someone who does so frequently enough under the guidelines of our AMC-NH Trails Committee Leadership Requirements document. Trails Committee mentored trips are in addition to any mentored trips required by other AMC-NH activity committees.

A Qualified Leader for the AMC-NH Trails Committee has led a combination of mentored trailwork trips under the auspices of the Trails Committee and had trailwork training by AMC or one of several recognized trailwork organizations within NH.

On a case-by-case basis the Trails Committee will evaluate the training of a leader who wishes to lead for us. Trailwork organizations with national or multi-state representation will generally qualify as equivalent to the organizations cited as examples in the Leadership Requirements document. Trailwork organizations represented only in one area may or may not be acceptable for training.

Beyond training, the Trails Committee will require at least one mentored trailwork hike with a Qualified Leader from the Trails Committee. Mentoring requirements are set out in the Leadership Requirements document. An individual seeking to lead trailwork trips is responsible for providing the Trails Committee Mentor Evaluation Form to the mentor when participating in a mentored trip. In return, the mentor is responsible for evaluating the prospective trailwork leader using that form. The form is available as a separate document.

## **FREQUENTLY ASKED QUESTIONS (FAQs):**

### **Liability Protection for AMC Volunteer Trip Leaders**

#### **1. How am I protected from liability should something go wrong on one of my trips?**

As a volunteer trip leader with the AMC, you are afforded many layers of protection that would not be in place if you led trips outside the AMC umbrella. The following structures are in place to protect you (and the AMC more broadly) from liability:

- **Your training and experience:** Your training and experience as an AMC volunteer trip leader will help prevent accidents and minimize negative outcomes should an accident occur.
- **Federal Volunteer Protection Act:** The Federal Volunteer Protection Act of 1997 states no volunteer may be held liable for harm caused by an act or omission if the volunteer was acting within the scope of his/her responsibilities. Protection from liability is not afforded if there is: gross negligence, criminal acts or reckless misconduct, or in the case of injuries caused by operating a motor vehicle that requires a license and insurance to operate, if the volunteer was under the influence of drugs or alcohol at the time of the act, or if the volunteer receives compensation for volunteering, in-kind or otherwise, that exceeds \$500 annually.
- **Acknowledgement of risks:** All participants must be made aware of the inherent and specific risks they may encounter on a given AMC trip. They are made aware of these risks via the Acknowledgement and Assumption of Risks & Release Agreement (aka the Volunteer Release Agreement) and via a verbal statement about risk given by the volunteer trip leader at the start of any activity. When participants have an accurate picture of the risks inherent to a trip, they are far less likely to seek damages should an accident occur.
- **Agreement not to sue:** In signing the Volunteer Release Agreement, all participants are agreeing not to sue the AMC, which includes its volunteer leaders. More specifically, they are agreeing not to sue the AMC for damages resulting from negligence, though if they believe gross negligence has been committed, they have the right to file a lawsuit.
- **Agreement to file suit in Massachusetts:** In signing the Volunteer Release Agreement, all participants are agreeing that if they file a suit against the AMC, they will do so in the state of Massachusetts, no matter where the damage occurred, where the participant lives, or where the accused person lives. Massachusetts is the state in which the AMC is headquartered and it has strong case law history upholding the validity of release agreements.
- **AMC Insurance:** All volunteer leaders are protected by the AMC's general liability insurance. A volunteer leader, acting in accordance with the AMC's Leadership Requirements and Guidelines, will be afforded legal counsel, court fees, and damage awards provided by the AMC's insurance, if needed.

**2. Is a non-publicized event covered by AMC insurance?**

For an Activity to be covered under the AMC's general liability insurance policy, it must be approved and announced or publicized to the public through the Activities Database (ActDB) and its established approval processes, with the exception of the two (2) circumstances noted below.

The following two (2) items are exceptions to the trip posting parameters as outlined above:

1. Postings: Events such as Fall Hiking Week and Fall Gathering, and Volunteer-led Camps & Cabins (VCC) facilities generally post a list at the beginning of each week, or other time period, of their approved Activities scheduled for that period.
2. For events where time restraints or urgency of the situation necessitate immediate posting (e.g., a paddling Activity dependent on the current water level or a trail maintenance day to clear blow down immediately following a major storm), sponsoring club units must enter these activities in the Activities Database first for the purposes of leader member verification. Where there is urgency, they may post to other media after the trip is in queue for Approval.

**3. Are trip leaders covered under AMC's insurance policies for drive time, i.e., shuttling participants to and from trip sites while using personal or borrowed vehicles?**

No. The AMC's liability insurance does not protect leaders from liability in the case of motor vehicle accidents. Motor vehicle travel is outside the scope of AMC-sanctioned activities. Any leader or participant who drives others in their car must be familiar with and comfortable with the limits of their own personal insurance policy.

**4. Are trip leaders covered for injuries to themselves which require medical care?**

No. Trip leaders should carry and be comfortable with the limits of their own personal health insurance.

## **Frequently Asked Questions**

### **About the AMC Acknowledgement and Assumption of Risk & Release Agreement (aka Volunteer Release Agreement)**

#### **1. What does the Volunteer Release Agreement say?**

Here are the main parts of the Volunteer Release Agreement in plain English:

- Participants must share responsibility for their own safety and the safety of the group.
- Participants acknowledge that the activity of the trip has inherent risks that cannot be eliminated. Risks include injury, property damage, illness, mental or emotional trauma, paralysis, disability or death.
- Participants agree to release and not sue the AMC (which includes its volunteer leaders) for damages resulting from negligence on the part of the AMC (including on the part of a volunteer leader).
- Participants agree that if they do file a suit against the AMC, they will do so in the state of Massachusetts.

In addition to the above aspects of the VRA, there are other important sections and details in the document. Volunteer trip leaders represent the AMC, and it is their responsibility to be familiar with the language in the VRA. Trip leaders should read the VRA in full and remind themselves of its contents periodically.

#### **2. Do trip leaders have to have participants sign the Volunteer Release Agreement?**

Yes. To not have participants sign the Volunteer Release Agreement is to deviate from the Leadership Requirements and Guidelines. If a leader were to allow a participant to join an AMC activity without signing the VRA, that leader would be exposing him/herself and the AMC to a variety of possible claims should some harm occur to the participant in the activity. That leader would not be protected from liability in most of the ways outlined in the FAQ document on Liability Protection and Insurance for AMC Volunteer Trip Leaders.

#### **3. What happens if a trip participant refuses to sign the Volunteer Release Agreement?**

If a person refuses to sign the Volunteer Release Agreement, he/she may not participate on the trip. There is no gray area – a signed VRA is required for participation.

#### **4. Do people who participate in activities frequently have to sign the Volunteer Release Agreement each time they go on an outing?**

Yes. The Volunteer Release Agreement specifies an activity, leader(s), and date(s). Because this will be different for each activity someone participates in, they must sign the VRA each time. This also provides you with the name and emergency contact for each individual – information that could be valuable in an incident.

#### **5. Should minors sign the Volunteer Release Agreement?**

If a minor is old enough to sign his or her name, he/she should certainly do so. Even if the law may treat minors differently in the event of legal action, minors should still be made aware of

the risks involved in an activity and be asked to acknowledge them. If a minor is too young to read and sign the form, a parent or legal guardian should write the minor's name, provide emergency contact information, and sign and date the Volunteer Release Agreement.

Whether or not a minor is able to acknowledge risk and/or sign the VRA, a legal guardian **must** also sign and date the document. As a reminder, AMC policy requires that individuals under 18 years of age must be accompanied by a parent or responsible adult, who is also responsible for the minor's actions.

#### **6. How often should I submit the signed Volunteer Release Agreements?**

Forms can be submitted as often as it is convenient for you but we ask that you wait no more than six months before sending the forms to the AMC Boston office.

Instructions for how/where to send them can be found at the bottom of the form. If submitting the document via email, please make sure that the resolution is of high enough quality to be legible and include this information in the subject line of your email: *Chapter, Trip Date, Leader Name*.

#### **7. What is done with signed Volunteer Release Agreements after they are received in the Boston office?**

In addition to providing data, signed VRAs are legal documents that may be useful in the event of legal action. Because of the potential for legal action to be taken years after an incident, signed VRAs are stored for ten or more years in the Boston office.

#### **8. Do leaders need to sign the volunteer release agreement & how often?**

It is best practice for leaders to sign the volunteer release agreement each time they lead an activity. In the event of the leader becoming injured during the activity, other members of the group will have access to their emergency contact information via the volunteer release agreement

**9. When filling out the VRA, can a participant list an emergency contact who is present at the same activity?** Asking participants to list an emergency contact who is not present is a common sense procedural item, not an AMC policy. If an incident or accident were to occur, being able to reach someone who was not a part of the group is good practice and may be helpful for a participant and for a leader.



## Trip Policy Information for Participants

AMC encourages involvement in its mission and activities for members and non-members. Our goal is to be a community that is comfortable, inviting, and accessible for people of any age, gender, race, religion, ethnicity, ability, sexual orientation, or socioeconomic status.

Although some AMC activities are designed to appeal to a particular audience based on age, skill level, or interest, AMC activities are open to all who meet the minimum qualifications established by the trip leader(s) and the organization's [Essential Eligibility Criteria](#). For activities that require additional skills, leaders often conduct an initial conversation with potential participants to go over what to expect in terms of difficulty, any required gear, or logistics. This step helps ensure that participants sign up for trips that match their goals, comfort, and skill level. Applicants may be excluded due to previously demonstrated personal incompatibility, unsafe actions, refusal to share community work, or inappropriate behavior.

The activities offered by AMC involve varying degrees of risk. You should be both physically and mentally prepared and equipped with the appropriate gear. You should always be aware of the risks involved in outdoor activities and conduct yourself accordingly. The trip leader is not responsible for your safety; you are. Prior to registering for any activity, you are encouraged to discuss your capabilities with the trip leader. In order to participate in club activities, individuals under 18 years of age must be accompanied by a parent or responsible adult, and obtain prior consent from the trip leader. Those accompanying a minor are responsible for that minor's actions.

To participate in many activities and use many of the facilities listed in this section, a signed liability release is required. The appropriate trip leader or facility registrar can provide info on what is required for specific activities or facilities. Minor participants, regardless of who they are accompanied by while participating in AMC activities must have a parent or legal guardian sign AMC's liability release agreement prior to the activity.

Except for meeting place and time, a leader may change an activity as conditions warrant. Leaders are not responsible for placing cars at an activity's end point unless it is so stated in the listing. Check current train/bus schedules where applicable. Pets may not accompany owners on AMC activities without permission from the leader.



## AMC Code of Conduct

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### **1. Introduction and Code of Conduct Value Statement**

Since its founding in 1876, the Appalachian Mountain Club (AMC) has promoted the protection, enjoyment, and understanding of the mountains, forests, waters, and trails of America’s Northeast and Mid-Atlantic regions through building and maintaining trails; operating huts, lodges, and campsites; engaging in conservation; and providing outdoor experiences for adults, youth, and families. We invite and help people of all identities to explore, develop, and deepen their appreciation of the natural world. AMC’s Code of Conduct (“the Code”) is meant to help guide and inspire behavior that creates a welcoming community.

AMC believes that the outdoors belongs to everyone. To be sustainable and impactful in carrying out our mission, the AMC community must create and embrace opportunities to be inclusive, kind and equitable so that we can best reach and reflect the diverse population of the Northeast and Mid-Atlantic Regions. As a multi-faceted non-profit, our greatest opportunity for success and mission impact lies with engaging a broader community of people from diverse backgrounds and experiences who share our passion for the outdoors.

AMC strives to provide:

- An accessible, safety conscious, and inclusive community
- Outdoor recreation, adventure, and enjoyment
- Opportunities for teaching, learning, sharing, and skill building for people of all identities and backgrounds
- Care for trails and access to recreational opportunities
- Active engagement in and advocacy for protecting the outdoors we enjoy

As part of our mission we encourage people of all identities to connect with the outdoors safely and responsibly. While many AMC activities require little to no previous experience, for safety reasons, some outdoor activities require participants to meet certain physical and cognitive criteria.<sup>1</sup>

### **2. Scope**

This Code of Conduct applies across the AMC community. Our community includes employees, volunteers, members, program participants, guests, visitors, contractors, vendors, and others who interact with the organization. It applies to interactions that take place across our operations, including in offices; on trips, programs and trainings; at AMC owned or operated facilities of all types; in meetings; on the trail; at social events; in written communication including online and social media; and at other events, activities, and places where we represent AMC. In other words, this code applies in every area of AMC – whether inside, outside, or online.

### **3. Standards of Conduct**

In every context, the people of AMC will conduct themselves in a manner consistent with AMC’s mission and Diversity, Equity, and Inclusion (DEI) values and in a way which is not detrimental to AMC, its members, the public or staff, and which will provide the highest level of enjoyment in the activities and other events sponsored by AMC. With this in mind, individuals will:

- Uphold a community built on mutual trust, integrity, and dignity for all, where issues are addressed in a respectful and inclusive manner. Involve staff and volunteer leadership as appropriate.

- Conduct and participate in AMC sponsored activities while prioritizing personal and group safety and minimizing the associated risks
- Respect the outdoors and the many ways people connect with one another and with natural places
- Remain free from conflicts of interest
- Follow all policies/rules as applicable, internal or external
- Represent the AMC and its mission in a positive, professional, and respectful manner

We encourage the involvement of all people in our mission and activities through membership, program participation, facility visitation, and volunteerism. Our goal is to be a community which values kindness, and is comfortable, inviting, and accessible for people with a broad range of identities and backgrounds.

#### **4. *Misconduct***

Misconduct includes actions in violation of the Standards of Conduct and inconsistent with AMC's mission and Diversity, Equity, and Inclusion values. Misconduct also includes actions that may be detrimental to AMC's community, the public, and the outdoor places we value. Examples of misconduct include, but are not limited to:

- Unwelcome or exclusionary behavior toward others of any kind (based on identities including, but not limited to race, gender identity, gender expression, sexual orientation, physical ability, physical characteristic, socioeconomic background, nationality, age, religion, or beliefs)
- Failure to prioritize personal and group safety during participation in AMC sponsored activities, whether through disregard for stated policies and rules or through negligence.
- Disregard for Leave No Trace principles and/or for the rules and regulations of outdoor places we visit.
- Failure to represent the AMC and its mission in a positive, professional, and respectful manner.

Some violations of the Standards of Conduct may rise to the level of serious misconduct, including:

- Willful disregard for personal and group safety during participation in AMC-sponsored activities resulting in imminent risk toward self or others
- Physical or sexual assault; violence or threats of violence toward others
- Discrimination, harassment, or hostility toward others of any kind (based on identities including, but not limited to race, gender identity, gender expression, sexual orientation, physical ability, physical characteristic, socioeconomic background, nationality, age, religion, or beliefs)
- Bullying
- Sexual harassment
- Illegal or unethical activity while participating in AMC sponsored activities, or outside of AMC sponsored activities when such misconduct may result in harm to the organization, its members, its staff, or the outdoor places we value
- Misuse or embezzlement of AMC funds or other assets

#### **5. *Reporting and Issues Management***

This section assures that mechanisms are in place to support the Code. In particular, action outlines are provided for when there has been an alleged breach of the Standards of Conduct. These resolution strategies are grouped into a few areas.

##### Support Team

The team that supports issue resolution will be comprised of employees from AMC's Human Resources, Risk Management, and Volunteer Relations departments. Where Volunteer Units have established internal review processes, volunteers will coordinate and communicate with staff. Additional assistance could come from the Leadership Team, Volunteer Unit Leadership, and Compliance Officers of the Board of Directors as well as outside counsel, as needed. The goal is to provide an objective and fair analysis while maintaining process integrity and individual privacy as much as possible.

### Communication Venues and Criteria for Reporting

AMC will consider all complaints and issues that are in violation of the Code for investigation and any possible disciplinary action. AMC will consider anonymous complaints, however, in order to facilitate AMC's investigation, complainants are encouraged to provide the following details when reporting an issue:

- Name and contact information
- Type of misconduct
- Name of person(s) breaching the Standards of Conduct
- Date, time, and location of incident
- Details of incident
- Names of any witnesses

These details may be communicated to AMC through:

- Email: [CodeofConduct@outdoors.org](mailto:CodeofConduct@outdoors.org)
- Regular mail: AMC, Attention: Code of Conduct, 10 City Square, Boston, MA 02129
- Phone: 617/391-6626

AMC's ability to investigate an issue could be impeded if the above requested information is not provided.

### Problem Solving and Investigation

AMC's standard is to acknowledge receipt of the initial complaint within five business days, and endeavor to resolve complaints connected with the Code as quickly as possible. During the investigation, designated members of the Code of Conduct Support Team typically will speak separately with the complainant and the respondent. The Team may interview others as deemed appropriate.

### Consequences and Closure

At the conclusion of the investigation, a decision will be made as to the need for any discipline, including but not limited to mediation or counseling, loss of membership, exclusion from activities, revocation of leader or volunteer status, termination of employment, or legal prosecution. As appropriate, AMC will inform the complainant(s) and the respondent(s) of the investigation's outcome. Parties can engage in an appeals process, which will be described when the parties are informed of the investigation's conclusions. Outcomes of the appeals process are final and are conducted by members of the Support Team (described above).

### Metrics and Policy Management

While individual issues will be kept confidential by AMC, broader metrics such as issue types, locations and other un-identifying characteristics will be tracked internally by Risk Management and Human Resources departments to build better training programs and communications around AMC's Code of Conduct.

## **6. Related Policies and Information**

If you have questions about any of these policies or information, please contact your staff or volunteer liaison.

- [AMC's Mission](#)
- [Diversity, Equity and Inclusion Values](#)
- [Leave No Trace principles](#)
- [Essential Eligibility Criteria \(EEC\)](#)
- Operating Rules
- [Bylaws](#)
- Zero-Tolerance toward putting youth in danger/at risk
- Drugs, Alcohol, and Weapons
- Conflict of Interest
- Whistle blower
- Anti-Harassment/Bullying

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<sup>1</sup> AMC values diversity – including persons with diverse abilities – in its programs. While we do not specialize in integrating persons with disabilities onto activities we sponsor, we encourage people of all abilities to consider participating in AMC activities. The [AMC's Essential Eligibility Criteria \(EEC\)](#) is a list of the physical and cognitive requirements of activities sponsored by the AMC. The AMC's EEC are intended to be a resource for anyone considering participating in an AMC-sponsored activity, and are not intended to be exclusionary. The AMC will consider reasonable accommodations, consistent with applicable law.

## **AMC Policies - Approved by the Board of Directors on February 2, 1997**

### **Sexual Harassment Policy**

The AMC does not condone nor will it tolerate sexual harassment by any member or staff. Sexual harassment may be physical or verbal and may be between the same sex or opposite sex. Those who feel that a case of sexual harassment has taken place should report the matter to their committee chair in the case of volunteers or the President in the case of a member of the Board. Incidents will be thoroughly investigated and a determination made if there is a case of sexual harassment. The investigation should be conducted in a manner to ensure the privacy of those involved. If an incident of sexual harassment is determined to have occurred, appropriate disciplinary action may be taken up to and including removal as a member, and a Board member may be asked to resign. Individuals with questions regarding sexual harassment issues may contact either the Chapters Relations Director or Human Resources Manager for assistance.

### **Conflict of Interest Policy**

In general, a person has a conflict of interest if he or she, or a member of their families or an organization in which he or she has an interest, has an existing or potential financial or other interests which may impair or reasonably appear to impair a member's independent, unbiased judgment in activities conducted for the Club, or which may be seen as providing a financial or other benefit. In these cases, members should disclose, in writing, to the committee chair such potential conflict of interest, and should refrain from such activity until the committee chair, in consultation with others as needed, has determined that the potential conflict will not have an adverse effect on the club and its members. Board members will be guided by the Bylaws while staff will be guided by the Personnel Policy and Procedures manual.

### **Diversity**

The AMC encourages the involvement of all people in its mission and activities, through its membership, programs, policies, and procedures. Our goal is to be a community that is comfortable, inviting, and accessible for people of any age, gender, race, religion, ethnicity, ability, sexual orientation, or socioeconomic status.

### **Prevention of and Reporting of Abuse and Neglect of Children**

In the course of outdoor programs sponsored by the Appalachian Mountain Club, our staff and volunteer trip leaders could encounter situations where they have to take direct action in order to prevent or report the abuse or neglect of children. The following policies and procedures give AMC staff and volunteers guidance in handling such situations. The policies and procedures are based on the applicable General Laws of each state where we have programs and chapters, as well as existing AMC policies. Each case is unique and will require that we exercise good judgment and make adjustments as necessary. Staff should work with their supervisors; volunteers with their committee chairs to seek guidance and resolution – AMC's Human Resources Director can assist.

It is the policy of AMC that:

1. Each child entrusted to our care will be afforded every reasonable safeguard against abuse or neglect.
2. All AMC paid trip leaders for outdoor programs, as well as their supervisors, will be considered "mandated reporters." They will comply with the intent and legislative requirements of local authorities:

- Chapter 119, section 51A of the General Laws of Massachusetts.
- RSA 169-C, New Hampshire Child Protection Act
- Title 22, Chapter 1071 Maine State Law

All AMC volunteer trip leaders are not considered “mandated reporters” but are encouraged to report child abuse in the child’s home state, as any citizen is encouraged to do.

3. Each trip leader – volunteer or staff - will use the procedures listed below to:

- Prevent child abuse
- Evaluate suspected child abuse
- Report cases of suspected child abuse

4. All AMC trip leaders will maintain confidentiality in handling information pertaining to allegations of child abuse or neglect. The use of names or other identifying information of both the child and the alleged abuser will be kept to a minimum.

### **Pennsylvania Specific Youth Protection Policy**

Please note: In order to comply with Pennsylvania Youth Protection Laws, all children under 18 years of age must be accompanied by their parent or legal guardian. This policy applies for all events offered by the Delaware Valley Chapter as well as any other chapter events within the state of Pennsylvania.

## **Appalachian Mountain Club Volunteer-Led Activities Information regarding Youth Participation**

As a part of AMC's Vision 2020, the club has identified an ambitious goal of providing outdoor experiences to 200,000 youth through direct service programming. To reach this goal, the organization recognizes volunteers will play a key role in providing close to home family activities offered through our chapters.

As a result of this initiative, volunteer Club Units of the AMC have requested clarification of Club-wide policies surrounding minors' involvement in the various volunteer run AMC outdoor programs. This document is intended to clarify minimum Club-wide requirements and guidelines. In addition, leaders should be aware of and comply with all local chapter and/or activity committee requirements pertaining to running any AMC outing.

### **Standard Chapter-Sponsored Volunteer Activities**

Traditionally, the majority of activities offered by our chapters have been primarily geared toward adult participants. Approved leaders running trips on behalf of the AMC are encouraged to use their discretion to determine whether they feel allowing minors to attend the activity is appropriate. Leaders may opt to allow a minor to attend an activity in the absence of their legal guardian assuming that another responsible adult whom the child knows prior to the outing is willing to accompany and supervise the child participant while in the field. Any minor attending one these outings (regardless of the presence of their parent or guardian) must have their parent or legal guardian sign AMC's Acknowledgement of Risks, Assumption of Risks, and Release Agreement for AMC Volunteer-Led Activities (Release Agreement) prior to their participation.

### **Family Programming**

A number of chapters currently have committees focused on providing trips specifically for families. These outings are to be run like other volunteer-led activities and must comply with local chapter requirements pertaining to running an outing. In addition, the leader should require a minimum ratio of 1 parent/guardian to 3 children whose purpose is to provide on-site supervision while in the field. AMC Leaders have the option of setting age ranges for individual programs based on the nature of the activity being offered.

## AMC Affinity Group Conduct

The Appalachian Mountain Club (AMC) values diversity, equity, and inclusion and recognizes that in order to create a space that fosters belonging, AMC must also carve out spaces to meet the different needs of our members. Through the years, AMC has expanded programs designed for families and members in their 20's and 30's which has offered opportunities for constituents with various comfort and ability levels in the outdoors. Over time, AMC has incorporated opportunities for other Affinity Groups—groups of people who share a specific minority and/or marginalized identity—into our programming. These groups provide an opportunity for individuals to participate in an experience without fear or judgement from others who do not share an understanding of their lived experience. While the exclusivity of Affinity Groups may at first seem counterintuitive to AMC's focus on inclusion, it is vital to constructing equitable safe spaces for those in the minority of the larger AMC community and/or are part of historically marginalized groups and thus face barriers in engaging with AMC and the outdoors.

In supporting affinity spaces, AMC is not diminishing the needs of members in the majority; AMC is listening to all voices when they express a need for AMC to deliver safe, supportive programming. Affinity spaces can help break through problematic traditions or norms when those traditions can lead to a group making assumptions about a person's ability or experience without clarifying with that individual. Affinity spaces provide a group of people the freedom to move effortlessly and develop new skills in a supportive space without having to push against the dominant culture.

As AMC continues to grow, we will remain committed to carving out new Affinity Groups to enhance our member experience and ensure that the outdoors is safe for everyone. AMC is always looking for new Leaders and volunteers to support diversity, equity and inclusion through leading trips and activities, as well as supporting various committees. Learn more about volunteering and leadership [here](#).

## Current AMC Affinity Groups

*This is not a complete list of the Affinity Groups that AMC has recognized or will recognize. Please contact Volunteer Relations at [volunteerrelations@outdoors.org](mailto:volunteerrelations@outdoors.org) if you have questions or would like to start a new Affinity Group.*

### 20's and 30's Program

AMC 20's and 30's program is dedicated to getting young people between the **ages of 20-39** who enjoy the outdoors involved with AMC. With an average member age of 62, AMC's community trends older and young members often find themselves in the minority at AMC. 20's and 30's groups are an excellent opportunity to build a network of friends who love the outdoors and are passionate about conservation. Powered by volunteer leaders and co-leaders, 20's and 30's groups offer a variety of outdoor activities and social events. Outdoor activities include day hiking, backpacking, local walks, trail work, kayaking, mountain biking, bicycling, skiing, camping, ice skating, and other activities. The 20's and 30's affinity group also sponsors trips to explore different regions of New England and the Mid-Atlantic throughout the year. [Here](#) is more information on the discounted AMC membership for individuals under 30.



## **Family Program**

AMC Family programs are open to groups of parents, guardians, grandparents, and kids of all ages who like to get outdoors. AMC understands that there are many definitions of family and we welcome all children who attend with a trusted adult. Our leaders coordinate family friendly hiking, camping, biking, fishing, and canoeing in summer and snowshoeing, skiing, ice skating, and sledding in winter. Kids are happiest and healthiest when they spend time outdoors while connecting with new friends, and families who share outdoor time together are stronger because of it. Our leaders are AMC members and parents with experience in the outdoors to share with other families. Day trips and activities are free and open to non-members.

## **Women's Program**

Women's programs are led by women for women. Activities include day hiking, backpacking, local walks, trail work, kayaking, mountain biking, bicycling, skiing, weekend trips, and other activities.

## **Programming for people with different physical abilities or limitations**

AMC recognizes that access to trails may be difficult for wheelchair users and others with mobility needs. Trails and trips should be researched and reviewed before being listed to ensure safety and access for all participants.

## **FAQ's**

### **How do Leaders protect Affinity Groups at AMC?**

Leaders should be a member of the Affinity Group they are looking to support. They have an obligation to maintain the integrity of programs dedicated to a specific Affinity Group. Leaders are the protectors of the spaces they are creating and have the authority to redirect anyone who does not share the same identity of the Affinity Group. This may happen during the participant screening process at the start of a trip program, or during a social event. A Leader's role is to meet the needs of the community through various activities and listing who the target Affinity group is up front to allow people outside of that group to self-select out of participating. These activities need be protected by the Leader to ensure participants have a positive experience. This means that if someone who is 40 or over wants to attend a 20's and 30's trip, Leaders can and should tell that person they cannot attend or ask them to leave. If a man shows up to a women's day hike, the Leader can and should tell that person they cannot attend or ask them to leave. AMC leaders offer thousands of trips each year and members are able to find an alternate, appropriate trip to participate in without detracting from the safe space created for a minority/marginalized group.

### **But promoting Affinity Groups doesn't sound very Inclusive?**

You are right! Affinity Groups are exclusive with the purpose of providing space for individuals that are in the minority and/or have been marginalized. By creating space for Affinity Groups, AMC is focusing on equity, which is just as important as inclusion and diversity. In a 2018 demographic survey of AMC, we discovered that our membership is an overwhelming majority of white, heterosexual men over the age of 55 with high levels of education. That means that if you identify as a woman, at AMC you are a minority. Right now, if you identify as LGBTQ+, at AMC you are a minority. If you are between the ages of 20-39, at AMC you are a minority. If you identify as Black, Indigenous, or a person of color, at AMC

you are a minority. If you are a wheelchair user or have other mobility needs, at AMC you are a minority. Exclusivity is not synonymous with being bad, corrupt, or unethical; rather, the exclusivity of Affinity Group programs protects those with a shared identity and makes a space to connect with others who share that same identity without fear.

### **If you're allowed to host a women's trip, then why can't I host a men's only trip?**

Affinity groups are only appropriate and effective when they support groups in the minority and/or groups who have historically been marginalized (e.g. people of color, women, LGBTQ+ individuals, etc.). A trip specific to a majority and non-marginalized group would support hurtful discrimination and reinforce the power dynamic of excluding and oppressing marginalized groups.

To use the example of trail work crews, most of the trail work is done by men with a handful of women participating. AMC does not need to endorse "Men's trail crew" because 9 out of 10 crews are comprised of men. It is the same for race, nearly all trips and activities are attended by white people and AMC does not need to endorse white trips and activities because white people are in the majority at AMC. If you do not think twice about showing up to an AMC trip and feeling comfortable, then you have a space at AMC. AMC is not taking away your space, trips and activities, but rather creating spaces for others at AMC who have not felt safe or comfortable in the past.

### **I want to post a trip for an Affinity Group I identify with. What wording can I use?**

In the trip name, make sure to list the Affinity Group audience you are targeting and the keyword "Affinity". This will help members find your trip. Here are some trip name examples:

- [Affinity] 20's and 30's Canoe and Camping Trip- Saco River, ME
- [Affinity] Women's 70+ Mt. Auburn Cemetery Local Walk
- [Affinity] Black/African American Hike at Seneca Creek State Park
- [Affinity] 5 mile Biking/Cycling for Wheelchair Users & others w/Mobility Needs
- [Affinity] LGBTQ+ Climbing Rumney Rocks- NH
- [Affinity] Intro to Fishing for Families at Cape Henlopen State Park
- [Affinity] LGBT over 60 Hike Mt. Washington
- [Affinity] Ladies Weekend at Corman AMC Harriman Outdoor Center, NY
- [Affinity] 20's and 30's Latinx Backpacking Trip
- [Affinity] Grandparents/Grandkids Hike and Stream Study

In the overview of your trip, you should also include the following language:

*This trip is designated specifically for [Women, 20's and 30's, families, etc.] only. If you do not identify with that group, you will be unable to register for and participate in this trip or activity in order to maintain the safety and integrity of the group. If you have questions, please contact [leader's name and email address] for more information.*

# The Appalachian Mountain Club's Essential Eligibility Criteria

## INTRODUCTION

The Appalachian Mountain Club promotes the protection, enjoyment, and understanding of the mountains, forests, waters, and trails of the Appalachian region. We believe these resources have intrinsic worth and also provide recreational opportunities, spiritual renewal, and ecological and economic health for the region. Because successful conservation depends on active engagement with the outdoors, we encourage people to experience, learn about, and appreciate the natural world.

Participant safety and health are the top priority on all AMC activities. To minimize risk to a group participating in an AMC program, each individual must take responsibility for himself or herself, must participate within his or her own limits, and must contribute positively to the health and well-being of other participants and to the group as a whole.

The AMC values diversity – including persons with diverse abilities – in its programs. While we do not specialize in integrating persons with disabilities onto activities we sponsor, we encourage people of all abilities to consider participating in AMC activities. The AMC's Essential Eligibility Criteria (EEC) is a list of the physical and cognitive requirements of activities sponsored by the AMC. The AMC's EEC are intended to be a resource for anyone considering participating in an AMC-sponsored activity, and are not intended to be exclusionary.

With approximately 8000 activities offered annually by the AMC, individual activity requirements can vary greatly. Activity descriptions may contain additional or more specific requirements. If you have concerns about your ability to meet certain criteria, please speak with the trip organizer to determine if reasonable accommodations can be made. If you have general questions about the AMC's EEC, or if you have concerns about the implementation of the EEC, please contact the Outdoor Leadership Department at [leadership@outdoors.org](mailto:leadership@outdoors.org).

## TERMS AND DEFINITIONS

### Assistance of Trained Aides

In some circumstances outlined in the EEC, participants may be eligible to participate on an AMC activity if they can meet an essential eligibility criterion with the assistance of a trained aide. Examples of trained aides include service animals, ASL translators, and individuals trained to assist a participant with physical, emotional, or communication requirements. In order for minors to meet the EEC, a parent, guardian or responsible adult who is known to the minor may act as an aide. If a participant requires a trained aide to meet any of the EEC, the participant or aide must notify the trip organizer beforehand,

except in cases when an adult is accompanying a minor. The trained aide must meet the physical and cognitive requirements as outlined in the AMC's EEC.

### Activities vs. Outings

The AMC uses the term 'activity' to describe any outing, trip, or event sponsored by the organization. One type of activity the AMC sponsors – outings – are defined as staying within ½ mile of a road or full-service facility and requiring no physical or technical abilities other than basic mobility indoors and outdoors. There are specific essential eligibility criteria that apply only to outings (section I). All other activities are subject to the general EEC for activities (section II). Some activities, such as backpacking, climbing, and bicycling, have additional essential eligibility criteria (sections III – IX). Finally, individual activity and course descriptions may contain additional or more specific requirements.

### Criteria with an Asterisk (\*)

Throughout this document, an asterisk (\*) is used to denote that individual activities may have a more challenging or more specific requirement than indicated in the criterion with the asterisk. Please refer to program materials or course descriptions or speak with the trip organizer if you have concerns or if you would like more detailed information.

## I) ESSENTIAL ELIGIBILITY CRITERIA FOR OUTINGS

All participants on AMC-sponsored outings must be able to complete the following requirements with or without assistance from a trained aide:

- 1.1 Effectively notify leaders or other participants of personal distress, injury, illness or the need for assistance.
- 1.2 Perceive, understand and follow instructions.
- 1.3 Perform necessary self-care, including maintaining adequate nutrition and hydration, dressing appropriately for environmental conditions, maintaining personal hygiene, and managing known medical conditions.
- 1.4 Work cooperatively as a member of a group and support a team approach, despite potentially challenging circumstances. This may require flexibility and the ability to compromise on an interpersonal or group level.

## II) GENERAL ESSENTIAL ELIGIBILITY CRITERIA FOR ACTIVITIES

All participants in all AMC-sponsored activities must be able to complete the following requirements without assistance:

- 2.1 Effectively warn others of potential or impending hazards such as falling rocks, slippery terrain, snow or rock slide, aggressive animals or insects, fast water, falling person, or other environmental hazards.
- 2.2 Effectively notify leaders or other participants of personal distress, injury, illness or the need for assistance.
- 2.3 Complete the preceding warnings and notifications up to a distance of 50 meters and in conditions with limited visibility and audibility, such as darkness, inclement weather, loud background noise due to high winds or fast-moving water, or terrain where a line of sight to other group members or leaders is not available.
- 2.4 Remain alert and focused for several hours at a time while traveling through open water, wilderness and other remote terrain.
- 2.5 Perceive, understand and follow basic instructions, such as a direction to move, stand still, grasp something, or other action required to avoid a major threat. Such basic instructions may be delivered in a hazardous or stressful environment.
- 2.6 Travel during periods of inclement weather.

All participants in all AMC-sponsored activities must be able to complete the following requirements with or without assistance from a trained aide:

- 2.7 Perceive, understand and follow detailed instructions on wilderness travel, risk management, personal care, hazard avoidance, and other topics.
- 2.8 Recognize and react appropriately to significant and apparent hazards, including ones previously identified by leaders or other participants.
- 2.9 Learn and perform necessary non-verbal communication systems for a given activity, such as hand signals, rope tugs, body movements, etc.
- 2.10 Perform necessary self-care in a remote and outdoor environment, including maintaining adequate nutrition and hydration, dressing appropriately for environmental conditions, maintaining personal hygiene, and managing personal (and, in some cases, group) safety gear.
- 2.11 Work cooperatively as a member of a group and support a team approach, despite potentially challenging circumstances. This may require flexibility and the ability to compromise on an interpersonal or group level.
- 2.12 Act in a manner consistent with Leave No Trace ethics. Participants do not need to know Leave No Trace ethics prior to participating in an AMC activity, however all participants must be able to follow leaders' directions regarding minimum impact guidelines. For more information, go to [www.lnt.org](http://www.lnt.org).

- 2.13 Manage any known medical conditions in a remote environment for as long as two times the scheduled length of the trip.

### III) ESSENTIAL ELIGIBILITY CRITERIA FOR WILDERNESS HIKING OR SNOWSHOEING ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on wilderness hiking and snowshoeing activities must be able to complete the following requirements without assistance:

- 3.1 Travel over uneven, variable terrain, including flat, uphill and downhill.\*
- 3.2 If conditions become adverse, travel without stopping for breaks for one hour.

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on wilderness hiking and snowshoeing activities must be able to complete the following requirements with or without assistance from a trained aide:

- 3.3 Carry personal and group gear required for the specific activity in a backpack or lumbar pack.\*
- 3.4 Carry the minimum pack weight for at least two hours beyond the intended duration of the activity.\*

### IV) ESSENTIAL ELIGIBILITY CRITERIA FOR ACTIVITIES WITH A CAMPING COMPONENT

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on camping activities must be able to complete the following requirements with or without assistance from a trained aide:

- 4.1 Learn and safely perform the fundamental camping skills of finding a campsite, setting up a shelter, and cooking with a camp stove.
- 4.2 Travel about the campsite in order to participate in instructional sessions, attend to toileting needs, and contribute to individual and group related tasks as necessary.

V) ESSENTIAL ELIGIBILITY CRITERIA FOR FLAT WATER CANOE, FLAT WATER KAYAK, WHITEWATER, RIVER, OR LAKE ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on boating activities must be able to complete the following requirements without assistance from a trained aide:

- 5.1 Wear all required safety gear, such as approved personal flotation device, spray skirt, Neoprene gloves, approved helmet, etc.
- 5.2 Control a paddle and pull it through the water in order to steer and propel the boat forward.
- 5.3 Hold their breath while under water and, while in the water wearing a properly fitted lifejacket, be able to independently turn from a face down to a face up position keeping their head above water.

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on boating activities must be able to complete the following requirements with or without assistance from a trained aide:

- 5.4 Enter and exit a wet or dry watercraft.

VI) ESSENTIAL ELIGIBILITY CRITERIA FOR ROCK CLIMBING OR MOUNTAINEERING ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on rock climbing or mountaineering activities must be able to complete the following requirements without assistance from a trained aide:

- 6.1 Meet all of the unassisted Wilderness Hiking EEC (3.1 – 3.2).
- 6.2 Wear all required safety gear such as an approved harness, approved helmet, mountaineering boots, crampons ice axe/tool, etc.
- 6.3 Grip a rope firmly, grasp the rock face, and negotiate upwards on a climb.

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on climbing and mountaineering activities must be able to complete the following requirements with or without assistance from a trained aide:

- 6.4 Meet all of the assisted or unassisted Wilderness Hiking EEC (3.3 – 3.4).



- 6.5 Provide a reliable belay to another climber during roped climbs. To do so, a participant must be able to reliably manipulate a climbing rope through a belay device.

## VII) ESSENTIAL ELIGIBILITY CRITERIA FOR SKIING ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on skiing activities must be able to complete the following requirements without assistance from a trained aide:

- 7.1 Withstand below freezing temperatures for two hours beyond the intended duration of the activity. \*

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on skiing activities must be able to complete the following requirements with or without assistance from a trained aide:

- 7.3 Move on skis over a variety of terrain conditions, including flat, uphill and downhill.\*
- 7.4 After falling down while skiing, be able to get off the trail and get into position necessary to continue skiing.

## VIII) ESSENTIAL ELIGIBILITY CRITERIA FOR ROAD AND MOUNTAIN BIKING ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on road and mountain biking activities must be able to complete the following requirements without assistance from a trained aide:

- 8.1 Pedal, steer, stop and negotiate a bike over a variety of terrain including flat, uphill and downhill.\*
- 8.2 Wear all required safety gear, such as an approved helmet and reflectors.

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on road and mountain biking activities must be able to complete the following requirements with or without assistance from a trained aide:

- 8.3 Get on and off of a bicycle.

## IX) ESSENTIAL ELIGIBILITY CRITERIA FOR TRAIL WORK AND STEWARDSHIP ACTIVITIES

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on trail work and stewardship activities must be able to complete the following requirements without assistance from a trained aide:

- 9.1 Meet all of the unassisted Wilderness Hiking EEC (3.1 – 3.2).
- 9.2 Wear all required safety gear such as an approved helmet, safety glasses, work gloves, boots, etc.

In addition to the EEC for all AMC-sponsored activities listed in section II, participants on trail work and stewardship activities must be able to complete the following requirements with or without assistance from a trained aide:

- 9.3 Meet all of the assisted or unassisted Wilderness Hiking EEC (3.3 – 3.4).
- 9.4 Perform manual labor tasks.

## Appalachian Mountain Club Activity Rating System

Appalachian Mountain Club (AMC) activities are rated using a scale of six levels described below. Consult the participant information or trip posting for details including the intended group pace and equipment requirements. Refer to the tables that follow the general descriptions for the miles, speed, and, when applicable, elevation gain. Note that any individual activity may be rated higher by the leader than the tables indicate for several reasons, such as a short distance but very difficult conditions (terrain, steepness, or exposure) or a much longer distance over easier terrain. Activities may also be rated lower at the leader's discretion if instruction in the activity discipline is among the objectives of the program. Some direct experience in the trip activity is required for vigorous and strenuous levels, especially if there are technical skills needed for the activity. This experience threshold may be met at the leader's discretion for hiking and backpacking programs if the participant is able to provide examples of recent similar experience and adequate fitness to participate in a group activity.

1. **Accessible:** Suitable for stroller, wheelchair, or other wheel assisted travel. Paved, hardened gravel, or ADA listed terrain or approach. The distance travelled and anticipated timing of the activity are detailed in the activity description. This rating is employed across activities and is not broken out in each of the tables below. Please direct any inquiries for reasonable accommodation to the trip leader in advance of the trip.
2. **Relaxed:** Suitable for most active participants with full mobility and participants new to the activity described. Expect to be actively on the move for about 3 hours/day. You may be on the trail, slopes or water for a longer time, but there will be plenty of rest breaks.
3. **Easy:** Reasonable fitness for the expected activity is needed, but the trip is designed for those new to the activity. Expect to be active up to 4 hours/day. A bit more active time than the relaxed rating, but with generous breaks.
4. **Moderate:** Fitness level and/or past experience to sustain the activity at a moderate pace is required. Expect to be active up to 4-6 hours per day. Reasonable breaks in the action.
5. **Vigorous:** Suitable for those with recent similar experience and/or demonstrated proficiency, such as being active in sports or often (regular) engagement in vigorous physical activity. Ability to perform at the expected level for back-to-back days for multiday trips. Expect to be active up to 5-6 hours per day, with brief breaks.
6. **Strenuous:** Most physically demanding. Fitness for the specific activity is required with direct experience in the activity highly recommended and potentially mandatory (see the activity description). Expect to be active 6+ hours per day for back-to-back days if it is a multiday trip. Breaks will be shorter/fewer than for other levels of trips.

## Tables for specific types of activities, to go with general ratings

### Hiking/Backpacking/Trekking

Activity Level	Moving Time up to __ hours	Distance up to __ miles	Daily Elevation Gain or Loss up to __ feet
Relaxed	3+	4	500
Easy	4	6	1000
Moderate	6	8	2000
Vigorous	6	12	3000
Strenuous	6+	15	3500+

#### Notes:

1. Trips involving hiking at high elevations, such as above 7000', may be rated more difficult than mileage and elevation gain alone would dictate.
2. Likewise, backpacking and trekking trips that involve carrying a heavy pack may be rated up a level.

### Trail Work

Travel to/from the work site rated as per hiking activity levels. Specific trail work activity along with difficulty will be detailed in the trip description.

### Biking

Activity Level	Moving Time up to __ hours	Distance up to __ miles	Average Moving Speed __ miles per hour	Elevation up to __ feet	Rise __ feet per mile
Relaxed	3	25	8.3	1000	40
Easy	4	35	8.8	2000	57
Moderate	4	45	11.3	3000	67
Vigorous	5	60	12.0	4500	75
Strenuous	6	80	13.3	7000	88

## Cross Country Skiing (Classic or Skate)

Groomed touring center maps are in kilometers so metric units are used.

Activity Level	Moving Time up to __ hours	Distance up to __ kilometers	Moving Speed average __ kilometers per hour	Elevation Gain up to __ meters	Rise __ meters per kilometer
Relaxed	3	8	2.7	100	13
Easy	4	12.5	3.1	200	16
Moderate	4	16	4.0	300	19
Vigorous	5	28	5.6	650	23
Strenuous	6	40	6.7	1000	25

## Backcountry Skiing

Activity Level	Moving Time up to __ hours	Distance up to __ miles	Average Moving Speed __ miles per hour	Elevation up to __ feet of gain	Rise __ feet per mile
Relaxed	3	3	1	300	100
Easy	4	5	1.25	500	100
Moderate	4	8	2	1000	125
Vigorous	5	12	2.4	2000	167
Strenuous	6	15	2.5	3500	233

## Paddling

Activity Level	Moving Time up to ___ hours	Distance up to ___ miles	Comments
<b>Relaxed</b>	3+	3	Flatwater, day trip, no portages
<b>Easy</b>	5	5	Flatwater, day trip, no portages
<b>Moderate</b>	6	6	Class 1 river; no portages, overnight
<b>Vigorous</b>	7	8	Class 1-2, river; 1-2 portages/day; overnight
<b>Strenuous</b>	7+	8+	Class 3 and higher rivers or class 1-2, river; portage class 3 rapids; longer and/or more difficult portages; overnight

## Sea Kayaking

All levels require ability to wet exit and re-entry, either solo or assisted.

Activity Level	Moving Time up to ___ hours	Distance up to ___ miles	Comments
<b>Relaxed</b>	3 hrs.	5	Protected water with little wind and current, within ½ mile of shore.
<b>Easy</b>	3-4 hrs.	6-7	Less sheltered rivers or harbors, open water in flatwater conditions, waves < 1ft., 5-10 knot winds, following seas, boat wakes.
<b>Moderate</b>	4-5 hrs.	8-12	Open water, up to 2 ft. seas, 2-3 knot currents, 10-15 knot winds, open water crossings up to 2 miles.
<b>Vigorous</b>	5 hrs.	10-15	Open water, up to ocean swells and chop, 20 knot winds, crossings with significant exposure to winds, waves, current and boat traffic.
<b>Strenuous</b>	7 hrs.	15-20	Open water in remote locations in foul weather, winds up to 25 knots, 3 ft. surf, open crossings of 5-10 miles.

## Climbing & Mountaineering

Activity Level	Moving Time Up to, Hours (Car to Car)	Distance up to, miles (Approach)	Comments
<b>Relaxed</b>	2-4 hours (Grade 1) 1 pitch	< 20 minutes < .5 mile as and 250' elevation gain	Top rope activity Figure 8/Skills
<b>Easy</b>	4-6 (Grade 1) 1 pitch	30 minutes .5 miles and 250-500	Top Rope/lead belay/sport climbing
<b>Moderate</b>	6-8 (Grade 1-2) 1-2 pitches	45 minutes .75 miles and 500'-750' elevation gain	Lead belay/anchor cleaning/ trad/sport Single Pitch
<b>Vigorous</b>	8-10 (Grade 2) 2-4 pitches	Up to 60 minutes 1 mile 750-1000 elevation gain	Multi-pitch Trad skills
<b>Strenuous</b>	10-12 (Grade 3) 3-9 pitches	> 60 minutes Over 1 mile AND over 1000' Elevation gain	Multipitch Trad skills

## Youth (14 & Under) & Family Hiking

Activity Level	Moving Time up to __ hours	Distance up to __ miles	Daily Elevation gain/loss up to __ feet
<b>Relaxed</b>	2	2	250
<b>Easy</b>	3	3	500
<b>Moderate</b>	4	5	1000
<b>Vigorous</b>	6	8	2000
<b>Strenuous</b>	6+	10+	2000+

### Notes:

1. Hikes over rough terrain and/or poorly marked trails may be rated up a level.
2. Trips where participants are carrying full packs for overnight backpacking programs may be rated more difficult than a day hike of the same distance.



## Service Animals on AMC Volunteer-Led Activities Guidelines for Volunteer Trip Leaders

*The participation of Service Animals in AMC events falls under the expectation that the Appalachian Mountain Club—including volunteer trip leaders—complies with the requirements of the Americans with Disabilities Act (ADA).* The following overview outlines ADA requirements regarding service animals, how these requirements apply to volunteer-led activities, which questions can and cannot be asked of the owner of a service animal, and which expectations may be set. These guidelines were established to minimize the risk of litigation to AMC and its volunteer leaders.

**Americans with Disabilities Act (ADA) Overview:** Under the ADA, organizations that are open to members of the public are prohibited from discriminating against individuals with disabilities. The ADA requires these organizations to allow people with disabilities to bring their service animals on activities it sponsors except in specific circumstances (see below). Volunteer trip leaders must comply with ADA requirements for the duration of their AMC activity, including any transportation that is an integral part of the activity, such as car-spotting.

**What is a service animal?** The ADA defines a service animal as any guide dog, signal dog, or other animal individually trained to provide assistance to an individual with a disability. If they meet this definition, animals are considered service animals under the ADA regardless of whether they have been licensed or certified by a state or local government. Service animals perform some of the functions and tasks that the individual with a disability cannot perform for himself or herself.

Some, but not all, service animals wear special collars and harnesses or are licensed or certified and have identification papers. However, such documentation may not be required as a condition for including an individual accompanied by a service animal on an AMC-sponsored activity. Although a number of states have programs to certify service animals, *the AMC leader may not insist on proof of state certification before permitting the service animal to accompany the person with a disability on a club sponsored activity.*

**Questions that AMC leaders may ask:** In instances where the participant's disability is not apparent to the activity leader, the leader is permitted to ask *only* the following two questions regarding the animal:

- (1) Is the animal required because of a disability?
- (2) What work or task has the animal been trained to perform? *The leader may not require that the service animal demonstrate the task(s) they are trained to perform.*

**Setting expectations:** Leaders may ask the service animal and its owner to abide by the following expectations:

- (1) That the service animal remains on-leash for the duration of the activity
- (2) That they abide by Leave No Trace principles for the duration of the activity

Leaders **may not** screen a service animal off of an AMC activity due to a suspicion that the animal is not a “real” service animal.

**The leader may screen a participant with a service animal only if their participation would fundamentally alter the nature of the activity** (for example, if the objective of the activity would not be achievable due to the physical ability of the animal) **or impact the safety of other participants.** Leaders are encouraged to use their judgment and screen participants for higher risk activities as well as share details with potential participants about the requirements to participate in a club-sponsored activity ([Essential Eligibility Criteria](#)).

Further questions regarding service animals or screening participants can be directed to AMC's Director of Outdoor Leadership at [leadership@outdoors.org](mailto:leadership@outdoors.org).





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## **AMC CHAINSAW POLICY**

Inter-Chapter Trail Committee

November 9, 2016

The Appalachian Mountain Club recognizes that many staff and volunteer trail workers use chainsaws in their work. They are an effective tool, but can pose hazards to both the operator and others. While AMC recognizes that individual trail workers have primary responsibility for their own personal safety, the AMC has created this policy to help ensure that all chainsaw users are trained and certified in both saw operation and in the hazards present from both the saw and from the nature of the work being performed. This policy establishes minimum standards of training and certifications, as well as minimum personal protective equipment (PPE), expected of all AMC staff and volunteers when a chainsaw is in use.

Below the terms sawyer and swamper are used throughout. A sawyer is the chainsaw operator and a swamper is the assistant who clears brush from around the sawyer; the swamper does not use a chainsaw.

### *Chainsaw Use Policy*

- In all cases, sawyers or the leaders of their work parties or of trail crews must obtain land manager/owner permission before using chainsaws
  - It will be at the discretion of the land manager/owner if permission is needed each time a chainsaw is used or an ongoing agreement can be signed
- If the land unit which the sawyer will operate on has a higher standard of trainings, certifications, and/or PPE requirements than those outlined in this AMC policy, then those land unit standards must be followed
- If the land unit which the sawyer will operate on has no rules or regulations, or lower standards than this AMC policy, these AMC standards must still be followed by AMC sawyers and swampers
- A sawyer must always have a swamper nearby to help in the project work and to act as a first responder in the event of an accident
- A sawyer is only allowed to use a chainsaw to the degree that he/she is certified in his/her chainsaw training course(s)
- A sawyer must be at least 18-years old. A swamper must be at least 16-years old.

### *Minimum Trainings & Certifications*

- Sawyers and swampers must hold valid Wilderness First Aid (WFA) or higher first aid certification
- Sawyers and swampers must hold valid CPR certification

**Main Headquarters:** 10 City Square • Boston, MA 02129 • 617-523-0636 • [outdoors.org](http://outdoors.org)

**Regional Headquarters:** Pinkham Notch Visitor Center • 361 Route 16 • Gorham, NH 03581-0298 • 603 466-2721

**Additional Offices:** Bretton Woods, NH • Greenville, ME • Portland, ME • New York, NY • Bethlehem, PA



## APPALACHIAN MOUNTAIN CLUB

YOUR CONNECTION TO THE OUTDOORS

- Swampers are not required to be trained in chainsaw use
- Sawyers must maintain valid certification in one of the following chainsaw trainings:
  - AMC Chainsaw Training
  - Appalachian Trail Conservancy Chainsaw Training
  - Northeast Forest and Fire Management, LLC Chainsaw Safety Training
  - Missoula Technology and Development Center Chainsaw Course
  - Game of Logging
  - S-212 Wildland Fire Chainsaw Course

### *Minimum Personal Protective Equipment (PPE)*

- Sawyers and swampers are required to meet the PPE standards of whatever chainsaw certification they hold valid, or they must use the below PPE, whichever is a higher requirement:
  - Sawyers and swampers must have:
    - First Aid Kit (FAK)
      - Must be kept at work site
      - Minimum acceptable contents for a specific chainsaw-use FAK found in addendum below
    - Helmet with six-point suspension
    - Ear protection
    - Eye protection
    - Gloves
    - Long pants
    - Kevlar or all-leather boots, at least 6" high on ankle
  - Additionally, sawyers must wear chainsaw chaps that reach to the instep of their boot

### *To the Extent Feasible, AMC will*

- Allow any sawyer holding valid certification from any of the above stated chainsaw training programs to operate on AMC owned land
- Host AMC Chainsaw Trainings throughout the entire AMC region (Potomac to Maine) at reduced cost to volunteer participants
- Extend the limits of its general liability insurance policy insuring the Club and its agents against damages arising out of acts of authorized persons in furtherance of official Club Activities. To be personally covered by AMC's liability insurance policy, sawyers/swampers must:
  - Be current AMC members acting in accordance with the provisions set forth in this document

**Main Headquarters:** 10 City Square • Boston, MA 02129 • 617-523-0636 • [outdoors.org](http://outdoors.org)

**Regional Headquarters:** Pinkham Notch Visitor Center • 361 Route 16 • Gorham, NH 03581-0298 • 603 466-2721

**Additional Offices:** Bretton Woods, NH • Greenville, ME • Portland, ME • New York, NY • Bethlehem, PA



## APPALACHIAN MOUNTAIN CLUB

YOUR CONNECTION TO THE OUTDOORS

- Be participating in an officially sanctioned AMC trail work activity
- Act in accordance with any volunteer service agreement they have signed with any land unit they work on

If a land unit does not accept any of the above listed trainings, then the sawyer must hold a chainsaw training certification recognized by the land unit.

Anyone may submit the curriculum of a different chainsaw training program to the Inter-Chapter Trail Committee Chair and AMC Director of Trails for approval as a reciprocal training to meet the AMC Chainsaw Policy standards. Additionally, anyone can submit a proposed chainsaw training curriculum to the Inter-Chapter Trail Committee at the Annual Summit meeting for approval and inclusion in the AMC Chainsaw Policy.

All AMC trail workers involved with the use of chainsaws are expected to comply with this policy by March 1, 2017.

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## MINIMUM ACCEPTABLE FIRST AID KIT FOR CHAINSAW USE

- Part Number:1910
- Part Title:Occupational Safety and Health Standards
- Subpart:R
- Subpart Title:Special Industries
- Standard Number:1910.266 App A
- Title:First-aid Kits (Mandatory).
- GPO Source:e-CFR

The following list sets forth the minimally acceptable number and type of first-aid supplies for first-aid kits required under paragraph (d)(2) of the logging standard. The contents of the first-aid kit listed should be adequate for small work sites, consisting of approximately two to three employees. When larger operations or multiple operations are being conducted at the same location, additional first-aid kits should be provided at the work site or additional quantities of supplies should be included in the first-aid kits:

1. Gauze pads (at least 4 x 4 inches).
2. Two large gauze pads (at least 8 x 10 inches).
3. Box adhesive bandages (band-aids).
4. One package gauze roller bandage at least 2 inches wide.
5. Two triangular bandages.
6. Wound cleaning agent such as sealed moistened towelettes.
7. Scissors.
8. At least one blanket.
9. Tweezers.
10. Adhesive tape.
11. Latex gloves.
12. Resuscitation equipment such as resuscitation bag, airway, or pocket mask.
13. Two elastic wraps.
14. Splint.
15. Directions for requesting emergency assistance.

These standards can be found here:

[https://www.osha.gov/pls/oshaweb/owadisp.show\\_document?p\\_table=STANDARDS&p\\_id=9863](https://www.osha.gov/pls/oshaweb/owadisp.show_document?p_table=STANDARDS&p_id=9863)

Additionally, examples of pre-made, acceptable FAKs can be found here:

- I. [http://www.benmeadows.com/ben-meadows-loggers-landscapers-first-aid-kits\\_139851/?searchterm=logger%2bfirst%2baid](http://www.benmeadows.com/ben-meadows-loggers-landscapers-first-aid-kits_139851/?searchterm=logger%2bfirst%2baid)
- II. [http://www.forestry-suppliers.com/product\\_pages/Products.asp?mi=36121](http://www.forestry-suppliers.com/product_pages/Products.asp?mi=36121)

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**AMC VOLUNTEER LED ACTIVITIES  
ACKNOWLEDGMENT AND ASSUMPTION OF RISKS & RELEASE AGREEMENT**

Date: \_\_\_\_\_ Leader: \_\_\_\_\_ Chapter: \_\_\_\_\_ Activity: \_\_\_\_\_

**PLEASE READ THIS ENTIRE DOCUMENT** (hereafter 'Document') **CAREFULLY BEFORE SIGNING. All participants must sign this Document. For participants under 18 yrs. of age (hereafter sometimes 'minor' or 'child'), parent/s or legal guardian/s (hereafter collectively 'parent/s') must also sign.** In consideration of the services of the Appalachian Mountain Club, Inc., a charitable, not-for-profit corporation, organized and existing under the laws of Massachusetts, and its chapters, including all officers, directors, employees, representatives, agents, independent contractors, volunteers (including leaders and co-leaders), members and all other persons or entities associated with it (collectively referred to in this Document as 'AMC'), **I (participant and parent/s of a minor participant) acknowledge and agree as follows:**

**AMC volunteer-led educational and/or adventure activities** may include, but are not limited to hiking, backpacking, camping, biking, skiing, maintenance of trails and facilities, mountaineering, rock and ice climbing, canoeing, kayaking, sailing, use of AMC huts or other facilities and transportation or travel to and from activities (referred to in this Document as 'activities' or 'these activities'). **The leaders of these activities are volunteers. They are not paid professional guides or leaders. In all activities, all participants share in the responsibility for their own safety and the safety of the group.** Participants (and parents of minors) take responsibility for having appropriate skills, physical conditioning, equipment and supplies for these activities.

**These activities include inherent and other risks, hazards and dangers** (referred to in this Document as 'risks') **that can cause or lead to injury, property damage, illness, mental or emotional trauma, paralysis, disability or death to participant or others.** Some, but not all of these risks include: hazardous and unpredictable ground, water or weather conditions; misjudgments made by leaders, co-leaders, participants or others; travel in remote areas that can cause potential delays or difficulties with transportation, evacuation and medical care; equipment that can fail or malfunction; the potential that the participant or others (e.g. co-participant, driver, medical and rescue personnel) may act carelessly or recklessly. I understand that AMC cannot assure participant's safety or eliminate any of these risks. **Participant is voluntarily participating with knowledge of the risks. Therefore, participant (and parent/s of minors) assume and accept full responsibility for the inherent and other risks (both known and unknown) of these activities, and for any injury, damage, death or other loss suffered by participant, resulting from those risks, and/or resulting from participant's negligence or other misconduct.**

**I (adult participant, and/or Parent/s for themselves and for and on behalf of their participating minor child) agree to release and not to sue AMC (as AMC is defined above)** in regard to any and all claims, liabilities, suits, or expenses (including reasonable costs and attorneys' fees) (hereafter collectively 'claim' or 'claim/s'), **including claim/s resulting from AMC's negligence (but not its gross negligence or intentional or reckless misconduct),** for any injury, damage, death or other loss to me or my child, in any way connected with my or my child's enrollment or participation in these activities, or my use of AMC equipment, facilities or premises. **I understand I agree here to waive all claim/s I or my child may have against AMC,** and agree that neither I, my child, or anyone acting on my or my child's behalf, will make a claim against AMC.

**I (participant and parent/s of a minor participant) agree** that the substantive laws of Massachusetts govern this Document and all other aspects of my relationship with AMC, and that any mediation, suit, or other proceeding must be filed or entered into only in Massachusetts. **This Document is intended to be interpreted and enforced to the fullest extent allowed by law. Any portion of this Document deemed unlawful or unenforceable shall not affect the remaining provisions, and those remaining provisions shall continue in full force and effect.**

**PARTICIPANT AND PARENT/S OF A MINOR PARTICIPANT AGREE: I HAVE CAREFULLY READ, UNDERSTAND AND VOLUNTARILY SIGN THIS DOCUMENT AND ACKNOWLEDGE THAT IT SHALL BE EFFECTIVE AND BINDING UPON ME, MY MINOR CHILDREN AND OTHER FAMILY MEMBERS, AND MY HEIRS, EXECUTORS, REPRESENTATIVES AND ESTATE.** Parent/s must sign below, both in their capacity as a participant, and as Parent/s of any minor child identified below.

<u>Check If Under 18</u>	Participant Name	Signature/Date (Guardians/Parents if Minor)	Emergency Contact (Name and Phone Number)

**APPALACHIAN MOUNTAIN CLUB VOLUNTEER-LED CAMPS & CABINS**  
**ACKNOWLEDGMENT AND ASSUMPTION OF RISKS & RELEASE AND INDEMNITY AGREEMENT**

**INTRODUCTION**

**PLEASE READ THIS DOCUMENT CAREFULLY BEFORE SIGNING. All participants must sign this Document. For participants under 18 yrs. of age (hereafter sometimes 'minor' or 'child'), one or both parent/s or guardian/s (hereafter collectively 'parent/s') must also sign.** In consideration of the services of the Appalachian Mountain Club, Inc., a charitable, not-for-profit corporation, organized and existing under the laws of Massachusetts, and its chapters, including all officers, employees, representatives, agents, independent contractors, volunteers (including leaders and co-leaders), members and all other persons or entities associated with it (collectively referred to in this Document as 'AMC'), I (participant and parent/s of a minor participant), **acknowledge and agree as follows:**

**ACKNOWLEDGMENT AND ASSUMPTION OF RISKS**

Use of AMC Volunteer-led Camps and Cabins and/or instructional, educational and/or adventure activities (which may be scheduled or unscheduled, supervised or unsupervised and/or occur during free or independent time) occur in a variety of locations in the U.S. and include the 'August Camp' program. Activities may include, but are not limited to hiking, biking, skiing, swimming, maintenance of trails and facilities, canoeing, kayaking, sailing, participant's independent use of AMC cabins or other facilities or use of those facilities in connection with AMC organized trips or activities, and transportation or travel to and from AMC facilities or activities (referred to in this Document as 'activities' or 'these activities'). **In all activities, participants share in the responsibility for their own safety. Participants (and parent/s of minors) take responsibility for having appropriate skills, physical conditioning, equipment and supplies for these activities.**

**These activities include inherent and other risks, hazards and dangers (referred to in this Document as 'risks') that can cause or lead to injury, property damage, illness, mental or emotional trauma, paralysis, disability or death to participant or others.** Some, but not all of these risks include: hazardous and unpredictable ground, water or weather conditions; misjudgments made by leaders, co-leaders, participants or others; travel in remote areas that can cause delays in transportation, evacuation and medical care; equipment that can fail or malfunction; the potential that the participant or others (e.g. co-participant, driver, medical and rescue personnel) may act carelessly or recklessly. I understand that AMC staff, leaders or other personnel cannot assure participant's safety or eliminate any of these risks. **Participant is voluntarily participating with knowledge of the risks. Therefore, participant (and parent/s of minors) assume and accept full responsibility for the inherent and other risks (both known and unknown) of these activities, and for any injury, damage, death or other loss suffered by participant, resulting from those risks, and resulting from participant's negligence or other misconduct.**

**RELEASE AND INDEMNITY AGREEMENT**

**Please read carefully. This Release and Indemnity agreement contains a surrender of certain legal rights. I (adult participant, or parent/s for themselves and for and on behalf of their participating minor child) agree as follows:**

**(1) to release and agree not to sue AMC,** with respect to any and all claims, liabilities, suits or expenses (including attorneys' fees and costs) (hereafter collectively 'claim' or 'claim/s') for any injury, damage, death or other loss in any way connected with my/my child's enrollment or participation in these activities, or use of AMC equipment, facilities or premises. **I understand I agree here to waive all claim/s I or my child may have against AMC, and agree that neither I, my child, or anyone acting on my or my child's behalf, will make a claim against AMC, as a result of any injury, damage, death or other loss suffered by me or my child;**

**(2) to defend and indemnify ('indemnify' meaning protect by reimbursement or payment) AMC** with respect to any and all claim/s brought by or on behalf of me, my child, a family member, a co-participant, or any other person for any injury, damage, death or other loss in any way connected with my/my child's enrollment or participation in these activities or use of AMC equipment, facilities or premises.

**This Release and Indemnity Agreement includes claim/s resulting from AMC's negligence (but not its gross negligence or intentional or reckless misconduct), and includes claim/s for personal injury or wrongful death (including claim/s related to emergency or medical response, assessment or treatment), property damage, breach of contract or any other claim.**

I agree that the substantive laws of Massachusetts govern this Document and all other aspects of my relationship with AMC, and that any mediation, suit, or other proceeding must be filed or entered into only in Massachusetts. **This Document is intended to be interpreted and enforced to the fullest extent allowed by law. Any portion of this Document deemed unlawful or unenforceable shall not affect the remaining provisions, and those remaining provisions shall continue in full force and effect.**

**Participant and parent/s of a minor participant agree: I have carefully read, understand and voluntarily sign this Document and acknowledge that it shall be effective and binding upon me, my minor children and other family members, and my heirs, executors, representatives and estate. One or both parent/s must sign below for any participating minor (those under 18 years of age).**

_____	_____	_____	_____	_____	_____
Participant Signature	Date	Print name here	Participant Signature	Date	Print name here

_____	_____	_____	_____	_____	_____
Parent or Guardian Signature	Date	Print name here	Participant Signature	Date	Print name here

_____	_____	_____	_____	_____	_____
Parent or Guardian Signature	Date	Print name here	Participant Signature	Date	Print name here

Approved 2018

**APPALACHIAN MOUNTAIN CLUB VOLUNTEER-LED AMC ADVENTURE TRAVEL TRIPS  
ACKNOWLEDGMENT AND ASSUMPTION OF RISKS & RELEASE AND INDEMNITY AGREEMENT**

**INTRODUCTION**

**PLEASE READ THIS ENTIRE DOCUMENT** (hereafter 'Document') **CAREFULLY BEFORE SIGNING. All participants must sign this Document. For participants under 18 yrs. of age (hereafter sometimes 'minor' or 'child'), one or both parent/s or guardian/s (hereafter collectively 'parent/s') must also sign.** In consideration of the services of the Appalachian Mountain Club, Inc., a charitable, not-for-profit corporation, organized and existing under the laws of Massachusetts, and its chapters, including all officers, directors, employees, representatives, agents, independent contractors, volunteers (including leaders and co-leaders), members and all other persons or entities associated with it (collectively referred to in this Document as 'AMC'), I (participant and parent/s of a minor participant), **acknowledge and agree as follows:**

Appalachian Mountain Club contracts with individuals or organizations that are independent contractors (not employees or agents of Appalachian Mountain Club) to conduct some of the activities participants may engage in. Although the Appalachian Mountain Club has made efforts to locate responsible contractors, it does not supervise or control these contractors and is not responsible for their conduct. Participant (and parent/s) acknowledges that they may independently investigate and assess these organizations and activities, if they choose to do so. **Further, Appalachian Mountain Club uses volunteers to assist with, and lead trips and excursions. These individuals are not paid professional guides or leaders. In all activities, all participants share in the responsibility for their own safety and the safety of the group.**

**ACKNOWLEDGMENT & ASSUMPTION OF RISKS**

AMC volunteer-led AMC Adventure Travel trips can take place in the U.S. or in foreign countries. Activities (which may be scheduled or unscheduled, supervised or unsupervised, and/or occur during free or independent time) include, but are not limited to hiking, backpacking, camping, biking, backcountry or cross-country skiing, trail maintenance, mountaineering, rock and ice climbing, canoeing, kayaking, sailing, swimming, snorkeling, and transportation or travel to and from activities (referred to in this Document as 'activities' or 'these activities'). **These activities include inherent and other risks, hazards and dangers** (referred to in this Document as 'risks') **that can cause or lead to injury, damage, death or other loss to participant or others. The following includes some, but not all of those risks:**

**Risks present in an outdoor, mountainous or wilderness environment on land or water, both on and off trail.** Travel can be subject to storms, strong winds, high altitudes, avalanches, flashfloods, currents, waves, whitewater, lightning, rapidly moving rivers or other water bodies, difficult stream crossings, snow or ice, extremely hot, humid or cold weather or water, steep terrain, falling rock, stinging or disease carrying animals or insects, wild animals and other natural or man-made hazards and dangers. Hazards may not be marked and weather is unpredictable year-round.

**Risks associated with travel in the U.S. or a foreign country.** Travel can involve unique risks, such as political unrest, terrorism and warfare, contact with unusual diseases, exposure to contaminated food or water, dangerous road or travel conditions, thievery, abduction and other risks. Participants may be subject to laws and legal systems in foreign countries that do not provide the same protections as the U.S. legal system.

**Risks in decision making,** including, without limitation, the risk that AMC may misjudge a participant's capabilities, health or fitness level, or misjudge some aspect of instruction, medical treatment, weather, terrain, water level, or route location.

**Personal health and participation risks.** The risk that participant's mental, physical or emotional condition (disclosed or undisclosed, known or unknown) combined with participation in these activities could result in injury, damage, death or other loss.

**The risk that equipment used** in an activity may be misused, or may break, fail or malfunction.

**AMC activities may take place in remote places,** several hours or days from medical facilities, causing potential delays or difficulties with communication, transportation, evacuation and medical care. Medical facilities may be primitive, inadequate or inaccessible.

**Risks connected with cooking and camping chores.** Risks include gas explosion, scalding or other burns associated with cooking over a gas stove or open fire, and water contamination in natural water sources. All water may be contaminated and should be disinfected, filtered or boiled before use.

**Risks associated with transportation.** Travel can be on foot or by vehicle, aircraft, train, taxi, bicycle, animal, boat or other means and can be over rough and unpredictable terrain or via oceans or rivers, with wind, rain, or other adverse weather conditions.

**Risks involved in riding or dealing with animals,** including without limitation, horses, donkeys, llamas or camels. Animals are unpredictable in all circumstances, whether participants are mounting, dismounting, saddling, riding, or dealing with animals in any way. Without warning, animals can kick, bite, stomp, rear, fall down, and react to the environment, people, other animals or objects. Risks include equipment that may fail, saddles that may slip and other riders who may not control their animals.

**Risks regarding conduct,** including the potential that the participant, or other participants or third parties (e.g. general public, rescue squad, medical facility) may act carelessly or recklessly.

**Risks regarding free or independent time.** Participants will have free and unsupervised time during, before or after the start of an AMC program. This may include periods of free time, or family/participant time alone while engaged in independent travel away from the group. AMC may provide information to individuals and families regarding local recreation opportunities or areas available during free time, or, provide transportation to and from activity sites. Participants and parent/s of minors are exclusively responsible for their and their child/s conduct, supervision and activity choices during this independent free time. **During both supervised and unsupervised activities, all participants share in the responsibility for their own safety and the safety of the group.**

**Other risks** that are generally associated with instructional, educational and/or adventure activities.

**These and other risks may result in participants: falling, being struck, colliding with objects or people, experiencing vehicle or boat collision or capsizing, drowning, reacting to high altitudes, weather conditions or increased exertion, suffering gastro-intestinal complications or allergic reactions, becoming lost or disoriented, or experiencing other problems. These and other circumstances may cause hyperthermia, hypothermia, frostbite, dehydration, burns, high altitude sickness, heart or lung complications, broken bones, concussions, paralysis, mental or emotional trauma or other injury, damage, death or loss.**

**I (participant and parent(s) of a minor participant) agree:**

- To accurately complete all required forms (including the AMC application and medical forms), abide by the terms of those documents, and obey all AMC rules, regulations and policies;
- If participant has any mental, physical or emotional conditions or limitations that might affect his/her ability to participate I agree to disclose those to AMC, and represent that participant is fully capable of participating without causing harm to him/herself or others;
- AMC is, and has been available, should I have further questions about these activities and the associated risks;
- AMC cannot assure participant's safety or eliminate any of these risks. Participant takes responsibility for having appropriate skills, physical conditioning, equipment and supplies for these activities.

**Participant is voluntarily participating with knowledge of the risks. Therefore, participant (and parent/s of minors) assume and accept full responsibility for the inherent and other risks (both known and unknown) of these activities, and for any injury, damage, death or other loss suffered by participant (and parent/s of minors), resulting from those risks and/or resulting from participant's negligence or other misconduct.**

### **RELEASE AND INDEMNITY AGREEMENT**

**Please read carefully. This Release and Indemnity agreement contains a surrender of certain legal rights.** Certain federal land agencies do not allow service providers to be released by their clients from liability for injuries or other losses occurring while operating under permit on those federal lands ('restricted federal lands'). **Therefore, except to the extent federal rules or regulations prohibit my doing so on restricted federal lands, I (adult participant, or parent/s for themselves and for and on behalf of their participating minor child) agree as follows:**

**(1) to release and agree not to sue AMC,** with respect to any and all claims, liabilities, suits or expenses (including attorneys' fees and costs) (hereafter collectively 'claim' or 'claim/s') for any injury, damage, death or other loss in any way connected with my/my child's enrollment or participation in these activities, or use of AMC equipment, facilities or premises. **I understand I agree here to waive all claim/s I or my child may have against AMC, and agree that neither I, my child, or anyone acting on my or my child's behalf, will make a claim against AMC, as a result of any injury, damage, death or other loss suffered by me or my child;**

**(2) to defend and indemnify ('indemnify' meaning protect by reimbursement or payment) AMC** with respect to any and all claim/s brought by or on behalf of me, my child, a family member, a co-participant, or any other person for any injury, damage, death or other loss in any way connected with my/my child's enrollment or participation in these activities or use of AMC equipment, facilities or premises.

**This Release and Indemnity Agreement includes claim/s resulting from AMC's negligence (but not its gross negligence or intentional or reckless misconduct), and includes claim/s for personal injury or wrongful death (including claim/s related to emergency or medical response, assessment or treatment), property damage, breach of contract or any other claim.**

### **CONCLUSION**

I (participant and parent/s of a minor participant) agree that the substantive laws of Massachusetts govern this Document, any dispute I have with AMC and all other aspects of my relationship with AMC, and that any mediation, suit, or other proceeding must be filed or entered into only in Massachusetts.

AMC reserves the right to remove any participant from the program who staff or leaders believe, in their discretion, presents a safety concern or medical risk, is disruptive, or acts in any manner detrimental to the program. If participant is dismissed or departs for any reason, participant (and his/her family) are responsible for all costs of early departure whether for medical reasons, dismissal, personal emergencies or otherwise. These costs include, but are not limited to medical evacuation and costs, plane, train or taxi fare, accommodations, and costs and compensation for staff accompanying participant. **This Document is intended to be interpreted and enforced to the fullest extent allowed by law. Any portion of this Document deemed unlawful or unenforceable shall not affect the remaining provisions, and those remaining provisions shall continue in full force and effect.**

**Participant and parent/s of a minor participant agree: I have carefully read, understand and voluntarily sign this Document and acknowledge that it shall be effective and binding upon me, my minor children and other family members, and my heirs, executors, representatives and estate. One or both parent/s must sign below for any participating minor (those under 18 years of age).**

_____ Participant Signature	_____ Date	_____ Print name here
_____ Parent or Guardian Signature	_____ Date	_____ Print name here
_____ Parent or Guardian Signature	_____ Date	_____ Print name here



## AMC PHOTO RELEASE

Date: \_\_\_\_\_ Leader: \_\_\_\_\_ Chapter: \_\_\_\_\_ Activity: \_\_\_\_\_

This form is for participants to indicate whether or not they will allow the Appalachian Mountain Club (AMC) to use photos taken on this activity. While we very much appreciate participants signing this release, doing so is not required in order to participate.

I hereby authorize the Appalachian Mountain Club (AMC) and/or parties designated by the AMC (including periodicals, other printed matter, or electronic media, and their editors) to use my photograph for sale to or reproduction in any medium the AMC or its designees see fit for the purposes of advertising, display, exhibition, or editorial use.

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

<input type="checkbox"/> I agree			
<input type="checkbox"/> I do not agree	Printed Name	Signature	Date

APPALACHIAN MOUNTAIN CLUB

Facility
Chapter

Volunteer Accident/Incident Report Form

Subject Name: D.O.B. Male/Female (circle one)
Subject Address
City: State: Zip:
Phone: Activity/Facility:
Date/Time of Incident Location of Incident:
Trip Leader:

WEATHER

Temp:(F) Precip: Wind:(mph) Visibility:

TYPE OF INCIDENT

(Check One)
Injury
Illness
Other

Outcomes of Incident:
1. Did subject leave activity, facility or event? Yes/no Date:
2. Was outside assistance used? Yes/No Date:
3. Did subject go to a medical facility? Yes/No Date:
4. Did subject return to activity or facility? Yes/ No Date:

LOCATION OF INJURY

- Head Eyes Face Mouth Neck Shoulder
Chest Upper Back Lower Back Abdomen
Pelvic Area/Hips Genitalia Upper Arm Elbow
Lower Arm Wrist Hand Finger Buttock
Upper Leg Lower Leg Knee Ankle Foot Toe

Circle One, Patient's : Right / Left / Midline of Body

RESPONSE

Were bodily fluids spilled? YES / NO

If yes, were universal precautions followed? YES / NO

(See below )

ACTIVITY AT TIME OF INCIDENT

- Sailing Road Biking Downhill Skiing Whitewater Kayaking
Cooking Ice Climbing Group Initiative Whitewater Canoeing
Camping Backpacking Winter Camping Winter Mountaineering
Day Hike Snowshoeing Mountain Biking Technical Rock Climbing
Trail Work Sea Kayaking Backcountry Skiing Social Event (dinner, movie etc)
X/C Skiing Vehicle Travel Flatwater Canoeing

Other:

Universal Precautions •re Blood and Bodily Fluids

- Use impermeable gloves if blood or body fluids containing visible blood are anticipated.
Stop the bleeding, cover the wound and change the uniform if contaminated with excessive amounts of blood.
Wash hands and skin after contact with blood.
Clean any surfaces or equipment with appropriate disinfectant and clean clothes or skin with soap and water or an appropriate antiseptic.
Use proper disposal procedures for contaminated clothing and equipment.
Use a ventilation device for emergency resuscitation.
Avoid direct contact with patient if you have an open skin condition.
Follow accepted guidelines for control of bleeding and for any body fluids containing visible blood.
Encourage all participants to use individual water bottles.

~ CONTINUED ON REVERSE ~



# Patient Care Form - Treatment Plan

# Patient Care Form

AMC 2022 Outdoor Leader Handbook

## Plan: Treatment Plan for every problem on Assessment List:

1) \_\_\_\_\_

2) \_\_\_\_\_

3) \_\_\_\_\_

4) \_\_\_\_\_

Monitor: How and how often do you plan to monitor this patient? Any changes needed to treatment?

## Sign Off: Anyone 18 and older can refuse care.

*I decline further medical care by the AMC and/or transportation to a local hospital.*

Patient Name (printed): \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Witness: \_\_\_\_\_ Date: \_\_\_\_\_

Witness: \_\_\_\_\_ Date: \_\_\_\_\_

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## Patient Information

Patient Name: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Age: \_\_\_\_\_ Sex: M / F

Address: \_\_\_\_\_

Phone #: \_\_\_\_\_

Emergency Contact Name: \_\_\_\_\_

Emergency Contact Phone #: \_\_\_\_\_

Course Name: \_\_\_\_\_ Date of Injury: \_\_\_\_\_

Care-Giver: \_\_\_\_\_ Location: \_\_\_\_\_

## Chief Complaint and Mechanism of Injury

(Pain Questions: onset, palliates/provokes, quality, radiating, severity (1-10), and trend)

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Primary Survey Problems

Airway \_\_\_\_\_

Breathing \_\_\_\_\_

Circulation \_\_\_\_\_

Central Nervous System \_\_\_\_\_

Deformity \_\_\_\_\_

Environmental \_\_\_\_\_

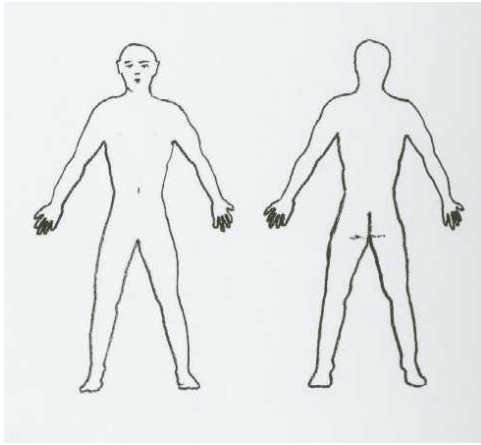
1/55

# Patient Care Form - Secondary Survey

# Patient Care Form - Secondary Survey and Assessment

AMC 2022 Outdoor Leader Handbook

## Physical Exam: Describe locations of pain, tenderness, and injuries:



## Patient History

Signs, Symptoms \_\_\_\_\_

Allergies \_\_\_\_\_

Medications \_\_\_\_\_

Past/Previous \_\_\_\_\_

Last food/drink & urination/defecation \_\_\_\_\_

Events \_\_\_\_\_

## Vitals (every 5 minutes for critical, every 15 for non-critical)

Time						
LOC oriented x ?						
Resp. R & effort						
Heart R & effort						
Skin Color, Temp, Moisture						
BP						
Pupils						

## Assessment: Problem List or Field Diagnosis

- 1)
- 2)
- 3)
- 4)

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<b>Original Date:</b>
<b>Dates Revised:</b>

## PARTICIPANT SCREENING FORM

The primary objective of the screening process is to pair participants and their experience with available activities. Be prepared with trip alternatives, and remember to check your bias before you pick up the phone so you don't fall into the trap of judging potential participants based solely on their physical fitness or equipment.

<b>Name:</b>	<b>Phone Number:</b>
<b>General Information:</b> <input type="checkbox"/> Member <input type="checkbox"/> Non-Member <input type="checkbox"/> Is anyone coming with you on this trip? (Reminder: other participants must contact you to officially register).	
<b>Email Address:</b>	<b>Chapter:</b>

### PARTICIPANT HISTORY

<b>Why are you interested in this trip? (Share any concrete trip objectives with the potential participant)</b>

<b>Trip History: "Tell me about your past experience [enter activity here]", "What's the longest trip you've ever been on?"</b>		
Year	Trip	AMC or other Group Organized Travel?

<b>What kind of exercise do you engage in regularly? How often?</b>	<input type="checkbox"/> Walking	<input type="checkbox"/> Hiking
	<input type="checkbox"/> Running	<input type="checkbox"/> Climbing
	<input type="checkbox"/> Biking	<input type="checkbox"/> Other:

<b>How will this trip be challenging for you? What's the worst problem you've ever had on a trip?</b>

<b>Do you have any medical concerns you'll be managing on the trip?</b>	<input type="checkbox"/> Yes	<input type="checkbox"/> No
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*Notes:*

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**Do you have any medical problems or are you taking any medications that could be pertinent to the trip? Allergies or asthma? Inhalers or Epi-Pens?**

Name of Condition or Medication	Carrying on the trip?	Notes

**Allergies (food or other) you'll be managing on the trip?**

Name of Allergy	Reaction

**MEDICAL TRAINING**

*Do you have any medical training you wish to share with me or the group?*

First Aid	<input type="checkbox"/> Yes	<input type="checkbox"/> No
CPR	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Wilderness First Aid (WFA)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Advanced Wilderness First Aid (AWFA)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Wilderness First Responder (WFR)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Emergency Medical Technician (EMT)	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Medical Training: _____	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Certification: _____	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Certification: _____	<input type="checkbox"/> Yes	<input type="checkbox"/> No

**Will you need to borrow or purchase any equipment for this trip?**  Yes  No

*Notes:*  
 \_\_\_\_\_  
 \_\_\_\_\_

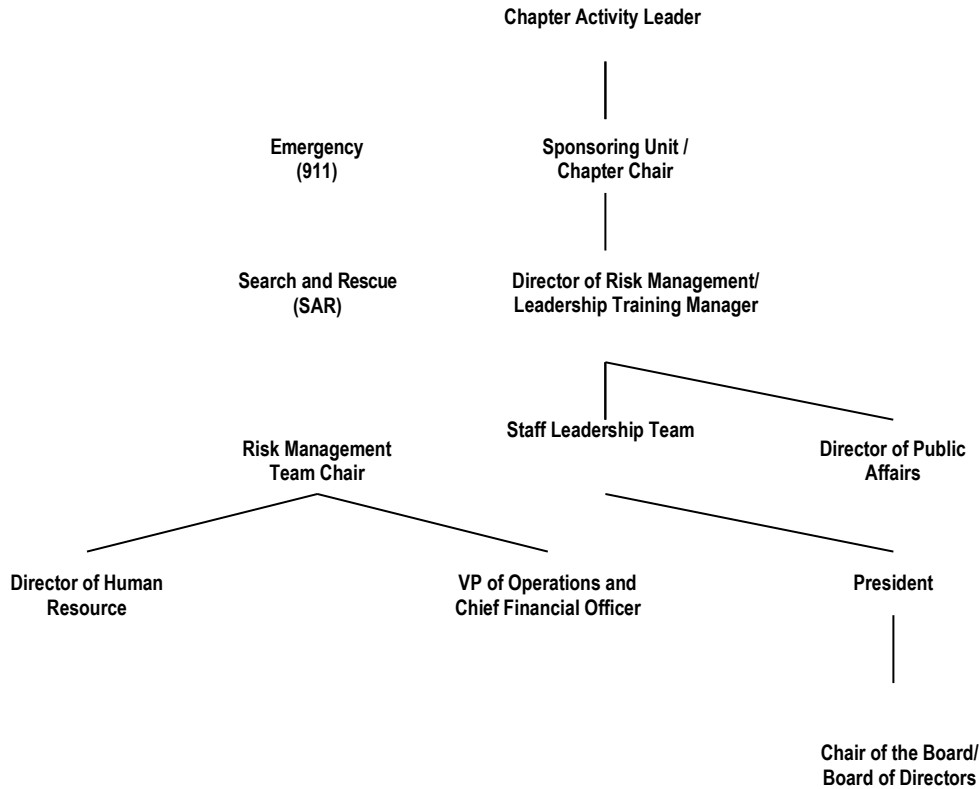
**Before concluding the call:**

- Does the potential participant have any questions?
- If the person is a good fit for the trip revisit requirements and next steps:
  - Deadline for Deposit
  - Cancellation Policy
  - Length of Trip
  - Where/When to Meet, How Long You'll Wait for Late Participants
  - What Meals/Snacks to Pack
  - Follow Up, If Any (Emails you'll Send to Participants, Follow Up Calls, Etc.)

**Additional Notes:**

\_\_\_\_\_

# AMC CHAPTER CRISIS COMMUNICATIONS CHART



Chapter Chairs and Sponsoring Unit Chairs are responsible for providing the correct current phone numbers for the following list.

**Please note:** Numbers listed under “Home” and “Other” are confidential and strictly for emergency use only.

### Specific Chapter Contacts (additional spaces for new or other important contacts)

Title	Name	Emergency Phone	Office Phone	Other
Sponsoring Unit Chair				
Chapter Chair				
Local Emergency Contact	911			
Director of Risk Management	Aaron Gorban	(800) 217-7975	(603) 466-8054	(603) 662-5651
Leadership Training Manager	Colby Meehan	(800) 217-7975	(603) 278-3821	(248) 792-1157
On-Call AMC Staff		(800) 217-7975		

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