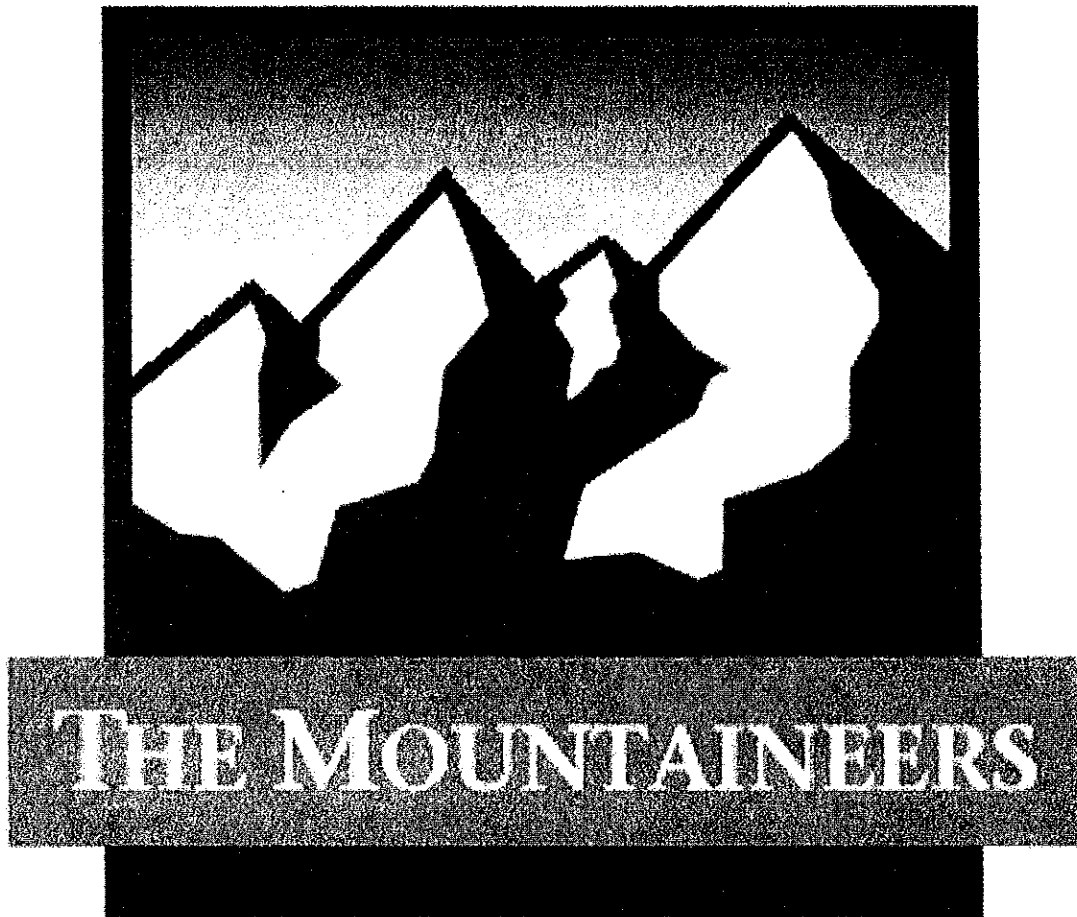


# KITSAP MOUNTAINEERS HIKE LEADERS GUIDE



(draft revision as of 02-21-2011 based on document prepared by Doug Terry approx.. 2003)

“Mountaineers activities are organized by and for the membership, for group enjoyment, exploration, and education in the outdoors. The leaders are volunteers, and activity participants cooperate in sharing responsibility and meeting the needs of the group as a whole.”

## INTRODUCTION

This Leader’s Guide is designed to provide the few mandatory rules and many suggestions for leaders of Mountaineers activities. It reflects the Mountaineers policies and procedures for outdoor activity leaders.

We appreciate your willingness to lead activities for programs, and welcome you to our pool of volunteer leaders. This guide will acquaint you with the policies, procedures and expectations set forth by the various committees for safe and successful programs. If you have questions concerning any of the information presented here, please don’t hesitate to contact the appropriate committee chair for additional clarification.

Happy Mountaineering!  
The Kitsap Mountaineers Executive Committee

## **ROLE OF THE LEADER**

The leader is a volunteer whose training, experience, and judgment have qualified him or her for a leadership position. The leader has the authority and responsibility for the safety of the group, making sure that the participants of the activity are adequately equipped based on Mountaineers policy. The Leader may wish to consult with the activity participants, but the leader makes the final decision regarding the group's safety in difficult situations.

Ultimately, the point of any Mountaineers outing should be the fun and full experience of arriving at the destination - not merely the destination itself. Even the most strenuous expedition is enriched by memories of good conversation, shared perceptions, and new friends. Reaching the destination is important, if reasonably possible, but having an enjoyable experience and returning safely and in good health rank higher. The leader is in a unique position to shape the quality and promote the safety of the outing. We hope that this guide will assist leaders in strengthening their innate leadership skills.

## **LEADERSHIP QUALIFICATIONS**

The Mountaineers always welcomes new leaders. In general, an aspiring leader shall be at least 18 years old, be a member of the Mountaineers, have demonstrated leadership within the Mountaineers, and be approved by the Executive Committee as recommended by appropriate committee. Scrambling and Climb leaders and climbers shall be MOFA qualified. Is it also recommended, but not required, that all leaders have knowledge of basic first aid. MOFA (Mountaineer Oriented First Aid) is offered by the Mountaineers several times a year.

## **CHARACTERISTICS OF GOOD LEADERS**

1. Enthusiasm for their area of activity and sharing the experience with others
2. Personal preparation and good judgment
3. Group awareness
4. Knowledge of and adherence to Mountaineers principles
5. Ability to make decisions
6. Willingness to accept responsibility for decisions
7. Concern for safety appropriate to the nature of the activity
8. Knowledge of and experience in their area of activity

## **BENEFITS OF LEADERSHIP**

Leading activities is a way to become involved, to choose your own destinations, and activity dates. Learning to lead activities is learning how to manage people and situations--skills that carry over into other aspects of life. Leading makes it possible for less experienced people to learn from you and experience the wilderness safely. The Mountaineers is a volunteer organization. Without volunteer leaders, there would be no activities and no Mountaineers' organization.

## **ACTIVITY RULES**

We strive to minimize formal requirements for activity participation in order to foster initiative and the spirit of adventure. Thus, most of this guide suggests guidelines for leader action that should always be tempered with judgment about the circumstances of an outing. There are, nevertheless, a few rules that are necessary to enhance the safety and appropriate conduct of all activities. It is these rules, derived

from the Seattle Headquarters Mountaineers Board of Trustees Policy which set the standard for a leader's performance. (See specific Activity Standards in enclosures #1 and #2)

**LEADER:** Every outing must have a leader who is at least 18 years old, a Mountaineers member, and formally approved by the Executive Committee. A co-leader may be assigned at the discretion of the leader. In this case, the co-leader must also be at least 18 years old, and a Mountaineers member. The function of a co-leader is to share responsibility with the leader. The Executive Committee will record the leader approval ~~on a form equivalent to attachment (1).~~

**WAIVER:** The Waiver, attachment (8), is for your protection. All participants, including guests, must sign the Mountaineers Release and Indemnity Agreement (The Waiver). The Waiver must be on file before the activity commences except as discussed below. **The best method is to require participants to sign up for your activity online at mountaineers.org—if they do not have a current waiver, they will be required to agree to it online before they can be accepted as a participant.**

Signing at the trailhead is not acceptable as it can be construed as duress **UNLESS** an individual who has signed up via email has explicitly stated they will sign the form at the trailhead. The individual's email shall include the text of the waiver, attachment (2), in its entirety. The leader should keep a copy of this email on file and attach it to the waiver if needed.

The Waiver is part of an overall risk management strategy. If you lead an outing or instruct at a field trip for the club and an accident occurs, you are protected by the club's liability insurance program, provided all participants have signed The Waiver.

**SIZE:** The group must be no fewer than 3 (including the leader) and no more than 12 persons. Be sure to observe any lower limits instituted by government agencies or property owners. Activity groups in wilderness areas are strictly limited to no more than 12 participants, leader inclusive. Fines for larger size groups can exceed \$100.

**MINORS:** No person under age 14 is allowed on an outing unless accompanied by a parent. No one between ages 14 and 18 is allowed on an outing without written parental consent. Leaders may decide whether to allow any person under 18 on an outing.

**GUEST POLICY:** Guests are encouraged to participate in Mountaineers activities, provided the guest has met the waiver requirements discussed previously, is conditioned for the activity, is 18 years or older, and has all necessary equipment. Guests are limited to two activities per year.

**TRIP LIST:** In order to maintain complete records of activities and assure that all participants are accounted for, leaders must have a Trip List Roster, ~~an example of which is provided as attachment (3).~~ **which can be printed out from the roster list on the activity listing under your Profile when you are signed on to mountaineers.org.** The Trip List Roster provides the names and phone numbers of those who have signed up for the activity. ~~The Trip List can be developed on a trip planner form, which can serve as telephone signup sheet, trip list and Post Trip Report form.~~ The important point is to keep a record of who attended the activity and how to contact them.

**POST TRIP REPORTS:** Post Trip Reports are used to report poor activity conditions and to notify the appropriate committee of any participant problems, accidents, etc., that may have been encountered during the event. The appropriate committee will follow up on any concerns or problems, so it is very important to be specific when filling out the Post Trip Report. Problems or not, you will need to send or email a Post Trip Report to the appropriate committee chair the week after the activity.

**ACCIDENT REPORTS:** Accidents requiring assistance should be reported immediately to 911 or the appropriate National Park Service office. The leader must report all accidents or injuries to the appropriate committee. Minor injuries and accidents can be reported in writing within 10 days. Major accidents or injuries need to be reported to the clubhouse within 24 hours. After rescue has been initiated, contact the club by dialing The Mountaineers Emergency Pager at ~~(206) 977-9700~~ (206) 521-6030. Leave your name and phone number and state you are a Kitsap Leader, and then wait for the return call. In most cases this will be within five minutes.

**CHANGING THE ACTIVITY DESTINATION:** If the environmental conditions do not permit you to do the scheduled activity, it is possible to change the destination. The new destination should be of the same level of difficulty. As leader, you will be responsible for notifying each participant of the change, as well as the new meeting place and time.

**CANCELING AN ACTIVITY:** While it is sometimes necessary to cancel an activity, it should be done only as a last resort. Even though leaders are volunteers, once an activity is scheduled, it becomes an obligation. Canceling activities after they are published creates an extremely awkward situation for everyone involved.

For published activities, the leader should try to find a substitute leader before canceling the activity. When an activity must be canceled, the leader should call each participant and notify him/her of the cancellation.

When the number of attendees to an activity is 2, the event is considered cancelled as a Mountaineer Activity.

**WILDERNESS CONCEPT:** In consideration of the wilderness and other wilderness users, no firearms, radios or other entertainment devices are allowed on activities. Cellular phones are allowed, but should be turned off. Pets may be considered on activities, where allowed by the governing agency (DNR, Forest Service, etc), if all people on the activity concur to this.

## **GUIDELINES FOR ACTIVITY LEADERS**

Leading safe and fun outings cannot be ~~prescribed~~ **prescribed** through rules. It requires participants and leaders who are prepared for the activity, as well as the experience, judgment, and sensitivity to adapt to unforeseen or changing circumstances. The following guidelines offer examples of problems that you should consider in advance, how to address these problems, and suggestions for planning and conducting safe activities.

**SIGNING UP TO LEAD ACTIVITIES:** Each committee will have its own set of procedures and deadlines for listing activities and maintaining a leaders list. As these may change from year to year, leaders should maintain regular contact with their committee.

**YOUR READINESS AND MOUNTAINEERING SKILLS:** Schedule activities that are well within your ability, and be physically and mentally ready for the activity with strength to spare to help others or to meet an emergency. You should be familiar with map or chart, compass, and route finding as required. Be sure that your own equipment is in good repair. Keep up your mountaineering, safety, and First Aid knowledge skills by taking advantage of classes offered by Mountaineers or the Red Cross. Consider completing the MOUNTAINEERING First Aid (MOFA) class (mandatory for climb leaders.)

**SCOUTING:** You are expected to have scouted the route in advance, especially if you have not done the route in awhile. You should be aware of current route conditions. It is also important to check road and weather conditions just before the outing. Recent weather conditions may affect the route, especially in spring and winter. Talk with the appropriate Ranger Station, Forest Service, or Park

Service personnel, or previous leaders of the outing PRIOR to scouting. Make note of amount of parking available, emergency telephone locations, trail locations, and water availability. The Washington Trails Association maintains trail condition reports on their web site at [www.wta.org](http://www.wta.org), as does [nwhikers.net](http://nwhikers.net).

**PARTICIPANT CANCELLATIONS:** Participants who cancel late and no-shows should be clearly indicated on the Post Trip Report. The appropriate committee should contact any chronic no-shows and late-canceling participants and clarify the cancellation policy. If your activity has a waiting list, please make an effort to fill the cancellation by calling those persons as soon as possible.

**SCREENING ACTIVITY PARTICIPANTS:** The leader may screen activity participants or hold a pre-activity meeting, if necessary. ~~In Kitsap, participants sign up through the leader, which allows .~~ The leader can check the courses being taken or completed by each participant in an activity by clicking on the participant's name on the activity roster found in your Profile when you are signed on to [mountaineers.org](http://mountaineers.org), which allows you to get some idea of whether the participant might be appropriate for the activity you are leading. Especially with strenuous or very strenuous activities, it is important to consider checking with an unknown participant in advance of the activity to be sure the participant has the necessary experience and fitness for the activity.

The leader can talk with potential outing participants about equipment, trail conditions, and readiness for the particular outing. Many an activity has been made or broken by how well the leader has evaluated the skill of a potential participant prior to the outing.

Questions may include:

- Are you a member of the Mountaineers? What Branch? How long?
- Have you gone on Mountaineers outings before?
- How long and or difficult were previous outings?
- Are you aware of the distance, elevation gain, and difficulty rating of this outing?
- Do you have and plan to bring the 10 essentials on this outing?
- Are you properly equipped for bad weather?
- Do you have physical conditions or disabilities that may cause you or the group any problems?
- Are you willing to drive and how many passengers can you take?
- Do you have a scheduled time you need to be back by?

By asking these questions and (politely) insisting on complete answers, the leader can make an initial assessment about the appropriateness of the activity for each participant. If in doubt, recommend something more suited to the person's skill level.

**EQUIPMENT:** The Ten Essentials are required on all outings that are not walks, *in addition to whatever else is appropriate for the activity you are leading*. Leaders should also carry a first aid kit adequate for the type of activity you are leading, the Trip List, an accident report form similar to attachment (4) which also provides a useful checklist of steps to follow in an emergency, and coins or cell phone for an emergency phone call. The leader should stress that participants must carry their own equipment. ***It is Mountaineers policy that leaders leave inadequately prepared participants at the trailhead or meeting place.***

Attachment (5) lists the current Ten Essentials for the various activities.

***Cotton is good for hankies, not clothing.***

**CARPOOLING:** Carpooling is recommended for all Mountaineers activities. Please remember that for official (insurance and liability) purposes, Mountaineers activities begin and end at the trailhead. Carpooling is a voluntary service offered by and accepted by activity participants as private individuals. Activity leaders arrange, but are not responsible for carpool arrangements. **Riders in carpool vehicles**

are expected to pay the driver \$0.15 per mile to offset the cost of gas and wear and tear on the driver's vehicle. It may avoid problems at the end of the day to remind all passengers of this policy before you leave the meeting place in the morning.

**CELLULAR TELEPHONES:** As more people are taking cell phones into the mountains, they are playing an increasingly prominent role in search and rescue. The Mountaineers neither encourages nor discourages their presence on an outing, but they should be switched off unless and until there is an urgent need. Leaders may wish to find out at the trailhead who is carrying a cell phone. Since they are not guaranteed to work when you need them, they should not mislead you into taking risks that would otherwise be unacceptable.

**OBTAIN PERMITS:** Obtain necessary hiking, climbing, and/or back country permits from the appropriate agency. File your trip plan with any appropriate agencies and leave an emergency phone number back home with someone who will know if the group is overdue. Parking permits are the responsibility of individual drivers.

**SPLITTING THE GROUP:** Turning a participant back once the activity has begun endangers the safety of that person and the rest of the group. When person requests to leave the group, have him or her sign out in the presence of witnesses. Explain to any person leaving the group that he or she is now on their own and has assumed that risk. If splitting the group become absolutely necessary, designate a leader for the new sub-group, and carefully brief them on what to do.

**SENSITIVITY AND TACT:** The most important aspect of leadership judgment is knowing when to quit. Remember that Mountaineers' activities are for recreation, not contests. The primary goal should be to come back safely, the second is to have fun, and a distant third is to reach the destination. It's not worth racing a storm, flogging your stragglers, or risking serious rockfall to make the summit. When the leader feels the party must retreat, explain the reasons which led to the decision. Ask for thoughts and opinions from the group, but be prepared to make the decision yourself--that is your job and should not be delegated.

#### **TIPS FOR A SAFE, THEN ENJOYABLE OUTING**

1. Obtain accurate and timely weather forecasts. [WWW.wrh.noaa.gov/sew/](http://www.wrh.noaa.gov/sew/) (Seattle National Weather Service web site) is a good site to check.
2. Take into consideration the time needed for the outing, the time of year, weather, hours of daylight and physical condition and experience of party members. When considering the hours of daylight, do not forget darkness falls much earlier in our heavily forested deep valleys. The sunrise/sunset website for our area is <http://www.sunrisesunset.com/usa/Washington.asp>.
3. Consider the avalanche or rock fall hazard along the route and select the route accordingly, taking into account the time of day and time of year for the activity.
4. When hiking on an ocean path, be alert to the tide schedule and how it will affect your hike. Interactive tide information is available at <http://www.saltwatertides.com/dynamic.dir/washingtonsites.html>
5. Anticipate an start to finish average ground speed of about 1½ to 1¾ mph on good trails when hiking is included in the activity. This value factors in rest stops, and other factors that slow the group.
6. Rest stops should be chosen in advance, strategically spaced about an hour apart, allowing time for a drink and a snack to replenish the body's energy supply. Stopping places should offer a place to sit down plus some added attraction--a sparkling stream or a beautiful view. If it's cold, find a sunny spot. If it's windy, look for a sheltered area. On ascents, stops should be brief--between 5 and 10 minutes. Faster members should wait until the slower members have caught up and had a chance to rest as well.

7. Plan to spend about an hour at the destination, which is usually a summit or a scenic spot. This is the climax of the outing, and the participants have earned the right to enjoy the fruits of their labors. Encourage exploration of the vicinity if it's not dangerous.
8. If a descent is part of the experience it need not be merely an anti-climax. Demonstrate plunge-stepping or glissading on an easy snow field where the runout is safe. These adventures broaden the experience of beginners and enhance everyone's enjoyment of the outing.
9. For a challenging activity consider appointing a co-leader. Choose someone who is strong, with whom you work well, and whose abilities you know. You want someone who can take over if you are incapacitated and is patient enough to follow behind the stragglers.

## GENERAL OUTING CONDUCT: START TO FINISH

It is policy to arrive 15 minutes early at the meeting location or carpool site. Identify yourself as the leader and check the names of participants on the Trip List as they arrive. Wait at the meeting place at least 15 minutes beyond the scheduled start/departure time for late arrivals UNLESS you are in a time critical situation such as dealing with tides or ferries. Identify no-shows on your Post Trip Report.

If less than three people show at the starting point, at your discretion, you may cancel the outing, however no Mountaineer sanctioned activity will consist of the leader and one other person.

### AT THE START OF THE TRIP:

- **Introduce** yourself and have all participants introduce themselves to the group. Also identify any guests and new members. Determine if any MOFA graduates are present.
- **Ensure guests or new members have signed The Waiver.** Those who haven't are NOT allowed on the outing.
- **Do equipment checks.** It is the leader's responsibility to ensure all participants are prepared for the activity. This does not mean the leader should request participants display all their gear; the leader should remind participants of the Ten Essentials and any other required equipment.
- **Describe the trip,** its potential problems, pace, lunch point, turn around location, side trails, special scenery, etc.
- **Establish the outing rules** - be explicit about how you intend to keep the group together. Remind everyone to wait at trail intersections or water crossings specified by you.
- Ask to be informed of any **special health concerns** in private such as Diabetes etc.
- **Appoint a Rear Guard** or Guards to ensure no one is lost behind.
- **Turn back unqualified participants,** who are demonstrably unqualified for the type or level of your outing, a gentle but frank conversation may avert future mismatches. If the person appears not to hear the message or is hostile, refer the matter to the appropriate committee.

### DURING THE OUTING:

- **Control the pace.** Your constant challenge is to keep the party moving and yet keep it together. It is the leader's option to keep the group close together or allow the group to spread out. At rest stops, allow slower hikers to rest after catching up with the faster ones.
- **Be courteous.** If your group is traveling on a trail, please remember not to make it difficult for other hikers, climbers, bicyclists, or horseback riders to pass. Step aside quickly if your group is being overtaken. It is customary for those moving downhill to yield to those going uphill.
- **Call the shots**--that's what it means to be a leader. A good leader can steer the group usually without being assertive, but sometimes it may be required. Be prepared to modify the outing plan as necessary to avoid exceeding the group's capability and external conditions. Be comfortable with the possibility of aborting the outing objective if circumstances prevent its safe achievement.
- **Be aware of the group's condition and morale.** The stronger, more skilled you are as a leader, the more sensitivity you need to develop toward those who are less experienced. Be aware of the stamina, skill, and confidence of all participants throughout the activity--they may change due to fatigue, weather, and the mix of personalities. Ask people how they are doing throughout the outing. Know hypothermia symptoms, and keep an eye out for it.
- **Watch the environmental conditions.** Be alert to unanticipated darkness due to cloud cover, or unexpected turns in the weather that can increase trip time.
- **Rest the group.** Remember these are people and this is not a cattle drive. Do not overcool during stops.
- **Share information** with people where hazards are and why you do things the way that you do. Discuss route or schedule changes, and ask for other opinions. When you safely can, delegate by having someone else count heads, ask someone to find the lunch spot, or on safe terrain, let others lead. The more you involve others in responsibility and sharing of opinions, the fewer conflicts you will have and the less likely you will be to overlook a problem.

### AFTER THE OUTING:

- Make sure every participant has returned to the cars. (No one is to leave until every participant is accounted for.)
- If a dinner/food stop is being planned, identify the restaurant and directions, etc.
- Make sure all cars start before leaving.
- Complete the Trip Report and send it to the appropriate committee on [mountaineers.org](http://mountaineers.org) after you return home. List participants not meeting the standards for participation and believed themselves wronged. The committee will review the circumstances of any participant about whom there are complaints. If the committee determines that the person is unqualified to participate in certain activities, it will advise the person and the Executive Committee that he or she is on probation until specific training is completed, experience is acquired or behavior modified.

## EMERGENCY PROCEDURES

While we hope that accidents or injuries will be minimized by skillful leaders, experienced and prepared participants, and good activity planning, they may occur. Leaders are required to report all accidents - minor and serious - to the committee via the Trip Report form and the Accident Report Form. The appropriate committees and other representatives of the Mountaineers will investigate all serious accidents.

### A. LOST HIKER/CLIMBER:

1. Determine when the participant was last seen.
2. Plan a search party. Determine the areas to be scouted and call loudly, or use whistles. You can choose to divide the group, but designate a leader in all new groups. Never send anyone out alone, nor should anyone be waiting alone while the group searches. Don't allow anyone to go home, you may need them later.
3. Designate a time and place to reassemble all search groups whether the lost participant has been found or not.
4. If, after this initial search, the participant is still lost, contact the local sheriff or park ranger. Remember that you have the best chance of finding a lost participant, as many agencies will not begin a search until a person has been gone for 24 hours.
5. After the search has been initiated, contact the Mountaineers via the Emergency pager ~~(206-977-9700) immediately.~~ **(206) 521-6030**

**B. MINOR ACCIDENTS:** A minor accident is one that in the leader's judgment has been successfully treated on the spot, does not require assistance in evacuation, and will not cause future complications. In such cases, the procedures below for serious accidents need not be followed, but the leader should inform their committee of the incident, no matter how minor, on the Post Trip Report Form.

**C. SERIOUS ACCIDENTS:** A serious accident is one that: requires assistance back to the trailhead; or requires assistance in evacuation; or requires hospitalization; or is treated by a medical professional; or results in death. In the case of a serious accident, follow the procedures below.

1. **STAY CALM:** As the leader, you are an important resource to the group in case of a serious accident. If you have a MOFA Leader present as a participant, they will take charge of the accident situation. It is the activity leader's job to ensure the group supports the MOFA Leader.

In the absence of a MOFA leader, utilize the below listed MOFA procedure to organize and assign specific individuals to do certain tasks. Elicit individual expertise (medical, climbing, scrambling, search & rescue). Utilize the entire group. Don't let anyone leave; they may be needed later to go for help, search, etc. Remember that your obligation is to the whole group, not just the injured person. Be careful that a second accident does not occur. Use the Accident Report Form (which should be carried in your first aid kit) to help plan your course of action.

### 2: EMPLOY FIRST AID PROCEDURES:

- i. Take charge of the situation.
- ii. Approach the victim safely if the terrain is difficult, steep or hazardous. Take precautions to avoid further injury to the victim or to others in the group.
- iii. Perform any urgently needed rescue and/or first aid. Breathing, pulse, and severe bleeding must be stabilized quickly.

- iv. Treat for shock if the injury is serious. Keep the victim(s) lying down and insulated from the ground. Keep them dry and warm, using their belongings first.
- v. Check for other injuries.
- vi. Plan what to do. The victim's condition, size and the strength of the party, terrain, time of day, and the group's location with respect to outside assistance must all be evaluated.
- vii. Carry out the plan. If possible, make sure everyone has something to do and no one is alone.

3. **SELF EVACUATION OR RESCUE:** Determine if your group is able to self evacuate or if you will need help from search and rescue operations. This decision will depend upon the party strength and resources, your location environmental conditions, and the victim's condition.

4. **SEND FOR HELP:** If it is necessary to send for help, send the two strongest members of the party, who know the route back to the trailhead to telephone for help (or use a cell phone if there is one in the group). Be sure they have coins for the phone. They should mark the route out if it may be confusing or darkness may fall. They should note terrain, distance, and time from the accident site to the road. These two members should be able to show other personnel the party's location on a map. Send the written accident report form with them to be sure that they have all the details about the accident, the victim's condition, and the group's resources. If your contact with outside help is by cell phone, you may still need to send two people to the trailhead to guide the rescuers in.

5. **CONTACT THE AUTHORITIES:** Call 911. Make sure they are given the details of the accident, the victims, and the weather and terrain conditions, the phone number, and the location of the phone so they can meet you. The caller should stay at the phone and be prepared to lead the rescue team to the accident site if required. Most important is ensuring 911 responders' directions are followed.

6. **NOTIFY THE MOUNTAINEERS:** After assisting with evacuation and other urgent matters, notify the appropriate Committee Chair, or the Mountaineers Seattle clubhouse via the Mountaineers Emergency Pager (206) 977-9700. (206) 521-6030

7. **FILE POST TRIP REPORT FORM:** For both minor and serious accidents, complete the post Trip Report form and file it with the appropriate Committee within 10 days of the accident. Complete and detailed information about all accidents is important to evaluate the accident in case of a legal challenge. It also provides opportunities to examine the causes of accidents and design safety programs and policies to avoid them in the future.

#### **D. STRANDED OUT OVERNIGHT**

1. Collect firewood. A fire should only be started in a life preserving situation.
2. Identify who has what equipment.
3. Stay together and stay put once dusk arrives.
4. Try fording rivers as soon after dawn as possible when the snow melt is at its lowest.
5. KEEP CALM.

## NEW MEMBER TRIPS

New Member Trips are just that, activities especially designed for new members of the Mountaineers. These activities are normally easy to moderate in difficulty. New members may be completely inexperienced in outdoor activities, experienced and new to the area, or very experienced participants looking for less strenuous activity with a group. The leader should design the activity primarily to be a pleasurable, safe, and sociable experience. In addition, New Member Trips give the leader an opportunity to educate new members on the Mountaineers' principles and guidelines for safe outdoor activity.

## STANDARD OUTING DEFINITIONS

### HIKING TRIP DEFINITIONS:

- Easy (E) Up to 8 miles round trip with less than 1,200 feet of elevation gain
- Moderate (M) Up to 12 miles round trip or with 1,200-2,500 feet of elevation gain
- Strenuous (S) Up to 14 miles round trip or with 2,500-3,500 feet of elevation gain
- Very Strenuous (VS) Over 14 miles round trip or with over 3,500 feet of elevation gain

Ratings may be adjusted for trail conditions.

Ratings from Minimum Clubwide Standards-Hiking, (effective 01/25/2007)

### SNOWSHOEING DEFINITIONS:

- Easy (E) As determined by the Committee or Branch sponsoring a trip
- Moderate (M) 500-2000 feet of elevation gain and less than 10 miles round trip
- Strenuous (S) Over 2,000 feet of elevation gain and any distance
- Intermediate ratings, such as E-M, may be used to describe trips that could be rated two ways

Ratings from Minimum Clubwide Standards-Snowshoeing, (effective 09/27/07)

## CONSERVATION GUIDELINES

As more people venture into the outdoors, it becomes ever more important to minimize our impact through good environmental practices. The high country is a very fragile ecosystem, which does not have the capacity to re-vegetate quickly. Areas of high use are also under great stress. The wilderness is home to many plant and animal species. We are a visitor in their home--respect this. The following guidelines have been prepared to help us recognize some of the environmental concerns in our use of the outdoors.

**WILDLIFE:** Don't feed the animals or allow them to steal your food – some sites require a Bear Cache year around due to varmints, not just bears. Camp out of sight of water so that animals won't be forced to go elsewhere to drink. Winter is a time of stress. Animals need all their stored calories from

the summer to survive. There is no margin for fleeing from humans. Do not disturb wildlife--at any time.

**HIKING:** Stay on trails, thereby minimizing impact. If there is no trail, use the route least damaging to soil and vegetation (e.g. rocks, snow, and dry grass). Shortcutting switchbacks damages vegetation, causes erosion, and leads to trail deterioration. Block shortcuts with rocks or logs to deter further use. Use low impact footgear whenever possible.

**CAMPING:** Camp at least 200 feet from water. Reduce contamination of water and impact on animals by locating your camp out of sight of trails, lakes and streams and away from animal feeding or sleeping areas. Use a highly impacted site, do not sprawl your campsite out, and keep the damage in one area. Try not to camp on vegetation, instead choose rocks, snow, sand, gravel, or hardpan. When camping in a pristine area, move your campsite often to minimize impact on any particular plants. Do not camp on tundra at all when you have a choice. Leave no sign of your camp.

**STOVES AND FIRE:** Unless a fire ring is provided at a site, use a stove unless a life depends on using a fire.

**SANITATION:** Minimize the chance of water pollution and the spread of water-carried infectious agents such as Giardia. Fecal contamination of water is the most common route of transmission. Never urinate in lakes or streams. Dispose of human waste at least 200 feet away from lakes or streams in a hole about 6-8" deep, but not in a drainage area affected by storm runoff, and above spring runoff line.

- Pack it all out when no hole can be dug (e.g. winter and glacier travel, rock climbing, etc.). Dispose of waste properly once out.
- Always carry out toilet paper and tampons in plastic bags.
- Latrines are the least desirable, and fecal matter should be covered after each use. The Latrine should be completely covered when leaving. Again, carry out paper and tampons.
- Always wash hands with soap and water before handling food, at least 200 feet away from lakes and streams.

**WATER POLLUTION:** Use biodegradable soap and a solar shower. Dispose of soapy water at least 200 feet from water. Use dirt or sand as scouring powder. Disinfect with boiling water. Disinfect all drinking and cooking water by use of a filter, chemical disinfectant (Chlorine Dioxide, Iodine, or Chlorine) or boiling at least one minute.

**LITTER:** Pack out all of your trash and other trash that you find. Take trash home and recycle. Do not place in roadside bins.

## MISCELLANEOUS

**NEW LEADER TALENT:** People of considerable experience and maturity often join even easy Mountaineer activities. Consider talking with them about the opportunities to lead activities. Inform your committee of possible new leaders. The Mountaineers are always seeking to renew its supply of competent, enthusiastic leaders.

**SUSPENDING LEADERS:** The committee of jurisdiction for an activity may temporarily or permanently suspend any leader who demonstrates dangerous leadership, poor judgment or unsafe conduct. When a committee receives a complaint concerning the action of a leader, the complaint is reviewed by the Committee Chair to determine the seriousness of the complaint. If it is an emergency situation, the Committee Chair will deal with the problem immediately; otherwise the problem will be addressed at the monthly meeting. The Committee Chair will assemble the facts pertinent to the

complaint and will then discuss the situation with the leader. The Kitsap Executive Committee must be notified of any complaints against an activity leader, and the Committee Chair's findings. Based on the findings, the leader will be notified in writing of the action taken, which could include a written warning, suspension, or deletion from the leaders list.

1. Enclosures to Kitsap Mountaineers Hike Leaders Guide as of 02/21/2011:
2. Mountaineers Minimum Clubwide Standard – Hiking (effective 01/25/2007)
3. Mountaineers Minimum Clubwide Standard- Snowshoeing (effective 09/27/07)
4. Mountaineers Emergency Contact Procedures and Call Tree (effective 06/29/2010)
5. Accident Report Form (effective 06/29/2010)
6. The Ten Essentials list
7. Club-wide Safety Committee Recommendations – 2009
8. Member and Activity Database Leader Instructions and Guidelines, v. 3.1, April 2008
9. The Waiver (effective 12/16/08)
10. Web links for Hike Leaders

## Hiking

### Application

This standard applies to club-sponsored mountain trips on established hiking routes longer than 2 miles round trip. It does not apply to outings in city and suburban settings. This standard applies to any committee sponsoring a hike, including, but not limited to: Hiking, Lodges, Backpacking, Photography, Naturalists, Retired Rovers, Singles, Mid-Week Hikes, and Under-The-Hill-Rovers.

### Trips

Hiking trips are restricted to maintained and unmaintained trails with the following exceptions:

- Travel may proceed on snow-covered trails unless the route exposes the party to terrain where a slip is likely to result in an uncontrolled slide.
- Parties may make off-trail excursions as long as the route does not expose party members to unreasonably hazardous terrain.

Trips will be rated using this scale, and the rating must be available to participants when they sign up for the hike.

- Easy (E) Up to 8 miles round trip with less than 1,200 feet of elevation gain
- Moderate (M) Up to 12 miles round trip or with 1,200-2,500 feet of elevation gain
- Strenuous (S) Up to 14 miles round trip or with 2,500-3,500 feet of elevation gain
- Very Strenuous (VS) Over 14 miles round trip or with over 3,500 feet of elevation gain

Ratings may be adjusted for trail conditions.

The minimum party size for a hike is 3 and the maximum party size is 12 unless other party limits apply.

### Leaders

Leaders must be approved to lead trips by the sponsoring committee.

Sponsoring committees must be satisfied that Leaders have competence in the following as appropriate for their trips:

- Group leadership
- Use of topographical maps and compass
- Mountain safety, including identification of hazards and actions to avoid injury
- First Aid
- Emergency preparedness (how to summon help should it be needed)

### Participants

Unless specified by the leader there is no prerequisite for signing up for a hike.

Participants are responsible for signing up only for trips that are within their capabilities, wearing suitable clothing, and carrying the ten essentials.

**Courses**

Any hike associated with a course must comply with the requirements of this standard.

**Related Clubwide Minimum Standards**

General Standards for All Club Activities

**Comparable Standard**

UIAA Standards for Voluntary Leaders and Instructors, October 2006

- Activity Standard 1: Mountain Walking and Trekking

## Snowshoeing

### Application

This standard applies to club-sponsored trips where snowshoes are used except for alpine scrambles and climbs that may use snowshoes for travel in winter conditions. This standard applies to any committee or branch sponsoring a snowshoe trip, including, but not limited to: Snowshoeing, Lodges, Singles, and Under-the-Hill-Rovers.

### Trips

Trips will be rated using this scale, and the rating must be available to participants when they sign up.

Easy (E)	As determined by the Committee or Branch sponsoring a trip
Moderate (M)	500-2000 feet of elevation gain and less than 10 miles round trip
Strenuous (S)	Over 2,000 feet of elevation gain and any distance

Intermediate ratings, such as E-M, may be used to describe trips that could be rated two ways.

The maximum party size is 12 unless other party limits apply.

The Leader may require safety equipment appropriate for the trip such as shovels, beacons, probes, ice axes, or crampons.

### Leaders

Leaders must be approved to lead trips by the sponsoring committee.

Sponsoring committees or branches must be satisfied that Leaders of E-, M-, and S-rated trips have competence in the following as appropriate for trips they are approved to lead:

- Winter travel skills
- Group leadership
- Use of topographical maps, compass, and altimeter
- Mountain safety, including identification of avalanche hazards, route selection, and group dynamics associated with decision making
- Mountaineering Oriented First Aid (Graduation from a MOFA course or equivalency)
- Emergency preparedness (including winter bivouacs and how to summon help should it be needed)

### Participants

There are no prerequisites for E-rated trips as long as the participant is able to competently travel on snowshoes and is properly equipped.

The following prerequisite applies to participants on M- and S-rated trips:

- Graduation from a club-sponsored Snowshoe or Winter Travel Course (or Equivalency); or

- Graduation from a Basic Climbing or Alpine Scrambling Course (or student status in one of those courses); or
- Leader permission

Participants are responsible for signing up only for trips that are within their capabilities, wearing suitable clothing, and carrying appropriate equipment including the ten essentials.

### **Courses**

Activity committees and branches may offer courses in snowshoeing and require them as prerequisites for trips. Established courses and their minimum content are:

#### Snowshoe Lite

- Equipment and clothing selection
- Trip selection based on conditioning and skill level
- Snowshoe travel (on-snow practice)
- Avalanche hazards and safe travel principles
- Basic emergency preparedness (Including preventing hypothermia and frostbite, summoning help if needed, and protecting and injured or ill person until help arrives)

#### Snowshoe (aka Winter Travel)

- Equipment and clothing selection
- Trip selection based on conditioning and skill level
- Snowshoe travel (on-snow practice)
- Avalanche hazards and safe travel principles
- Using an avalanche beacon, probe, and shovel (on-snow practice)
- Ice ax use on steep slopes (on-snow practice including self-belay and self-arrest)
- Use of topographical maps, compass, and altimeter
- Emergency preparedness (including winter bivouacs and how to summon help should it be needed)

### **Instructors**

Snowshoe Course instructors must be:

- Graduates of the course they are instructing (or have equivalency), or
- Approved Snowshoe Leaders, or
- Approved by the sponsoring committee to instruct

### **Related Minimum Club Wide Standards**

- Mountaineering Oriented First Aid (MOFA), under development

### **Comparable Standard**

UIAA Standards for Voluntary Leaders and Instructors, October 2006

- Activity Standard 2: Winter Mountain Walking and Snowshoeing

## Mountaineers Emergency Contact Procedures and Call Tree

Members of all branches/committees with a trip emergency should:

- 1) First call **911**, and ask to be transferred to the Sheriff of the county they are in (or National Park Service for Rainier, Olympics, & North Cascades) for a Search and Rescue (SAR).
- 2) Second notify the club by calling the Mountaineers Emergency Line:

**206-521-6030**

This will bring the services of the Mountaineers organization to bear. The club representative can provide advice on managing through the incident, notify emergency contacts and relevant committee/club leadership, and serve as spokesperson for external organizations such as the media.

They will hear a message that says: ***"You have reached the Mountaineers Emergency line. If you are involved in a trip emergency, call 911. If you've already done this, please press '1'. You will be connected to the club representative on-call who can provide further assistance. If you have tried that person and they are not available, press '2'", if they are not available press "3".***

Pressing "1" will connect directly with Mike Maude

Pressing "2" will connect with the Executive Director (Martinique Grigg)

Pressing "3" will connect with the President (Tab Wilkins)

Pressing "4" will connect with the Safety Committee Chair (Dan Lauren)

---

Cut out the following and carry in your 10 essential package:

### Mountaineers Emergency Line

First call **911**, and ask to be transferred to the Sheriff of the county you are in (or National Park Service for Rainier, Olympics, & North Cascades) for a Search and Rescue (SAR).

Then call the club at: **206-521-6030**

# FIRST AID/ACCIDENT REPORT FORM (begin here)

## FINDINGS

### Airway, Breathing, Circulation

Initial Rapid Check  
(Chest Wounds, Severe Bleeding)

ASK WHAT HAPPENED:

ASK WHERE IT HURTS:

ALLERGIES

TAKE PULSE & RESPIRATIONS | PULSE | RESPIRATIONS

SKIN: Color  
Temperature  
Moistness

PUPILS: Regular in size  
Equally reactive

STATE OF CONSCIOUSNESS

HEAD: Scalp -- Wounds  
Ears, Nose -- Fluids  
Jaw -- Stability  
Mouth -- Wounds

NECK: Wounds, Deformity

CHEST: Movement, Symmetry

ABDOMEN: Wounds, Rigidity

PELVIS: Stability

EXTREMITIES: Wounds, Deformity  
Sensations & Movement  
Pulses Below Injury

BACK: Wounds, Deformity

PAIN (Location)

LOOK FOR MEDICAL ID TAG

VICTIM'S NAME

AGE

COMPLETED BY

DATE

TIME

# RESCUE REQUEST

Fill Out One Form Per Victim

TIME OF INCIDENT | AM | PM | DATE

NATURE OF INCIDENT

EXCESSIVE  HEAT  COLD  
FALL ON  ROCK  SNOW  CREVASSE  AVALANCHE  
 FALLING ROCK  ILLNESS

BRIEF DESCRIPTION OF INCIDENT

INJURIES (List Most Severe First) | FIRST AID GIVEN

SKIN TEMP/COLOR:

STATE OF CONSCIOUSNESS:

PAIN (Location)

RECORD:

Time	Initial				When leave scene
Pulse					
Respiration					

VICTIM'S NAME

AGE

ADDRESS

NOTIFY (Name)

RELATIONSHIP

PHONE

OTHER COMMENTS:

DETACH HERE - SEND OUT WITH REQUEST FOR AID

TEAR HERE - KEEP THIS SECTION WITH THE VICTIM

## FIRST AID GIVEN



## Ten Essentials List

<b>Hiking</b>	<b>Kayaking</b>	<b>Climbing</b>
Navigation	Flotation both ends of kayak	
Sun Protection	USCG approved PFD	
Insulation	Paddle	
Illumination	Paddle tether	
First Aid Supplies	Spray skirt	
Fire	Waterproof bag for extra clothing	
Repair Kit/Tools	Bilge pump with flotation	
Nutrition + extra	Self-rescue paddle float	
Hydration + extra	Whistle or air horn	
Emergency Shelter	50 ft floating tow rope	
	Waterproof illumination	
	Repair kit	
<b>Recommended</b>	<b>Recommended and may be required by the leader</b>	
Whistle	Spare paddle	
	Rescue sling	
	Flares	
	Chart in waterproof case	
	Waterproof timepiece	
	Wet-suit or dry-suit	
	Waterproof jacket	
	Hat with visor	
	Pogies or gloves	
	Neck strap for eye/sun glasses	
	Sunscreen	

## The Mountaineers Club-Wide Safety Committee Recommendations – 2009

The below concepts and recommendations should be communicated to all activity committees and leaders and should be disseminated or made available for review by The Mountaineers community.

Based upon review of submitted club-wide incident reports for 2009, the Safety Committee has decided to focus on the dangers of party separation. We believe this is one of the highest risks we face as an organization, and one of the most preventable. In many cases this problem of not keeping people together is not seen as very important, but it can have large negative consequences. We've seen several Search And Rescues be initiated over the last several years, all because a team member was able to get off by themselves and become separated from the rest of the party.

The problems of party separation have been part of the recommendations for the last few years. These points are still valid, and need to be re-emphasized:

The section following was taken directly from the 2007 recommendations:

### *Party Separation*

- *There is a tendency to split party up between strong and weak members*
- *Party separation reduces margin of safety, and increases the risk of the trip*
- *On the way out, it is inadvisable to let the stronger members leave weaker ones behind*
  - *If an incident occurs, strong members should be available to provide assistance*
  - *If stronger members wait for entire party to return to trailhead, no one is left behind*
- *Consider largest appropriate time & distance gap between any party member*
  - *Consider rule of thumb of no more than 15 minute separation between party members*
  - *Consider how long it could take to communicate with other team members and how long it could take for them to respond*
- *Stronger party members might take turns staying with slower members*
- *Avoid sending injured members back to camp/trailhead by themselves*
- *Leader needs to set expectations during sign-up, screen participants, insure compatible group, let members know their abilities, set expectations again at trailhead*
- *Ensure all members recognize goal of keeping party members together; even if a party member is slow from the start, party must accept requirement to stay together*
- *Set defined stopping points/breaks when members regroup*
- *Take turns staying with slower party members*
- *Radios are helpful for party communication if team gets spread out*
  - *Radios give flexibility, if you must separate, can still communicate, but understand limitations – an intervening ridge can totally block signals*

This section was taken directly from the 2008 recommendations:

### *Traveling Alone*

*Don't allow someone to travel by themselves, keep the buddy system.*

### *Injured parties never travel alone*

- *Don't let an injured or sick person hike back to trailhead by themselves.*
- *Injured party doesn't want to be burden to group so are willing to go by themselves.*
- *Leader should work to overcome this reluctance and should insist on someone accompanying the party out.*
- *Don't let embarrassment cloud judgment.*
- *Reemphasize no party separation, if folks spread out upon the trail, always sync up at trail junctions.*
- *Also consider not allowing person to leave trailhead by themselves if they arrive early.*

### *Buddy System*

- *Don't let one person go by themselves, even healthy party members.*
- *Set up a buddy system, each person responsible for another, buddy up*
- *Leaders need to set expectations of group members.*
- *Leader write down the license plates of cars at trailhead, would know that all parties accounted for.*
  - *Doesn't take the place of setting explicit expectations that nobody leaves the trailhead for home until everyone accounted for.*

In addition to the above, the committee would like to emphasize these additional points for 2009:

### *Radios/Walkie-Talkies*

- If the party uses radios or walkie-talkies, leader still needs to keep party together
- Radios don't work unless they are in line of sight, and the party can become dependent on the radio
- Radios can give a false sense of security
- If using radios, make sure everyone knows the purpose
- Don't let members think that radios are substitute for keeping party together
- Don't let group spread out. Use radio for emergency communication
- Radios have been misused as a substitute for requiring of keeping the party together
- Radios don't work if a ridge is in between, work line of sight only

### *Leader's Responsibility*

- The trip leader must keep the party together; any separation needs to be brought back together at critical junctures.
- Very difficult many times to keep party together, this is a critical leadership skill
- Leader must step in and enforce keeping together if some members want to go their own way
- Leader must set expectations with every participant

### *Personal Responsibility*

- Every participant has the responsibility to not allow themselves or others to become separated
- Everyone must have the expectation they are buddied up with someone else
- Activity participation privileges should be dependent on adherence to this policy

- Strong participants should consider carrying more of the gear than weak participants if that will facilitate keeping the party together and speeding the group's progress.

#### Organizational Responsibility

- This party separation problem needs to be addressed by the organization (activity and Branch)
- Leadership privileges should be dependent on adherence to this concept
- Branch/Activity leadership should take action if a leader refuses to adhere to this concept
- Branch/Activity leadership should take action if a participant refuses to adhere to this concept

#### Frequently Asked Questions

Use the following Q/A for discussions within your branch or activity. Writing these out is an effort to surface the major questions that will be asked and to help provide clarification as to the intent of the recommendations.

Q) Does this mean we have to all be lined up and hiking in lockstep?

A) No. This means that every participant understands the concept, has been paired up with a buddy, and will insure they are not separated by sight or sound from that person.

Q) Does this mean that the entire group must always stay together?

A) No. The main party can split into subgroups (provided the leader has agreed), but these subgroups must know they are to stick together amongst themselves, know expectations on where to meet up with the other subgroups, and insure that nobody is left on their own. These subgroups should adhere to the other principles that have been discussed (don't separate strong and weaker members, etc.).

Q) What about bathroom breaks, and privacy?

The party can stop; folks can then go off trail as far as needed for bathroom privacy, then return to the group where the party then leaves once everyone is accounted for.

Q) What about someone who stays in camp by themselves?

A) This is not considered separation as the person is in a safe and known location with adequate supplies. This assumes the person is not so sick as to need attendance.

Q) What about a person who doesn't want to continue to the summit and nobody wants to stay with them?

A) If the person is in a safe and known location and visible by sight/sound from the summit, has adequate supplies, and everyone is assured they will not move, then that is not considered party separation. If the person is not within sight/sound of the party, then the leader needs to use sound judgment. Does the person have adequate supplies? Does this person have adequate shelter from heat, cold, wet? Are there any route-finding issues getting back to this location? Is there a radio available to keep in contact with this person? Is this person capable of being by themselves? Will this person stay put? If there is any doubt on the questions above, this person should not be left alone. The leader needs to keep someone with this person.

Q) Is it OK to leave two people by themselves, say waiting for the party to return from the summit

A) This is consistent with the buddy system and not considered a separation.

Q) What about a small party size (say 3 members) and one person has just had enough and needs to turn around, is having difficulty, and the destination will be out of sight/sound of this person?

A) The party needs to take care of this person and will most likely abandon the destination.

They will take care of this person, not leaving them alone, making sure they are warm/dry/cool as conditions warrant, and insure this person arrives safely back at the trailhead.

Q) What if the person I'm paired up with is obnoxious and I don't want to hang out with them?

A) The buddy system says you need to be in sight/sound of your buddy at all times. Speak with your leader if you need a change of buddies.

Q) A participant is very slow, feeling sick and is going to keep the main party from reaching the summit, can we just send them back to the trailhead?

A) A participant should never be left to navigate by themselves, particularly if feeling sick. Another party member should accompany them back to the trailhead.

Q) What about the start of a trip where different groups will start from the trailhead at different times to make up for the pace of slow or fast members?

A) As long as no one is travelling by themselves, and prior arrangements have been made so the leader knows when to expect everyone at camp or defined meeting place, this is consistent with the buddy system.

Q) We are on a Kayak trip and some of our paddlers are too tired to paddle against the headwind, can we split the party up, have the strong paddlers go back to the launch and have the tired paddlers go downwind to another dock?

A) As long as no paddler is left to fend by themselves, and there is adequate experience and supplies with each group, this is consistent with the buddy system and the group should split up.

Q) A leader experienced an incident on their last trip where one of the party members got out on their own and it took awhile to locate them, what should "branch/activity leadership" do to this leader?

A) Branch/Activity Leadership should insure that the leader and all party members are aware of the policy to keep the party together. Any incident should be investigated as to the cause: were folks not aware, did something out of the ordinary occur? Learnings should then be applied so the likelihood of this happening again is minimized. The goal is to grow the capability of leaders and to help them accomplish this difficult task. Assuming Branch Activity Leadership is satisfied this leader did not willfully allow the party separation, then it will stand as a lesson learned.

Q) A leader says they are not going to support this policy, that all participants should be capable of fending for themselves and this is too much bureaucracy from Branch/Activity Leadership.

A) If after much discussion this leader refuses to accept the responsibility of keeping the party together and understands the principles, he/she should be removed from activity leadership.

Q) A participant says he/she is not going to travel at the slow speeds of the party and will just go on up ahead and meet at the final destination (including back to the trailhead).

A) If after much discussion this participant refuses to accept responsibility of keeping the party together and the principles of the buddy system, this participant should be denied access to future activities.

Q) A participant is just not keeping up with the main party. They don't want to be a drag so they offer to leave the official trip midway through and go back on their own. Can the leader declare this person is no longer part of the trip and separate from them?

A) No. The leader has the responsibility to bring all party members back to the trailhead safely, they cannot abandon the trip midstream. There are times when previous arrangements have been made for folks to leave the main party, say they want to stay out and camp an extra day. These arrangements should be made in advance, but never for a single participant.

# **Online Member and Activity Database**

## **Leader Instructions and Guidelines**



**Version 3.1**  
**April 2008**

## **Table of Contents**

<u>Introduction</u> .....	<u>3</u>
<u>Overall Procedure for Scheduling an Activity and Filing Reports</u> .....	<u>4</u>
<u>Listing an Activity Online</u> .....	<u>4</u>
<u>Editing the Details of an Online Activity Listing</u> .....	<u>9</u>
<u>Changing the Activity Leader</u> .....	<u>10</u>
<u>Changing the Activity's Destination</u> .....	<u>10</u>
<u>Canceling an Activity Scheduled for a Future Date</u> .....	<u>11</u>
<u>Registering Participants for Your Activity</u> .....	<u>11</u>
<u>Canceling Participants From Your Activity</u> .....	<u>12</u>
<u>Viewing and Using Your Activity's Roster</u> .....	<u>13</u>
<u>Viewing the Carpool Roster</u> .....	<u>14</u>
<u>Updating Your Roster and Assigning Credit to Students After the Activity</u> .....	<u>14</u>
<u>Filing and Editing Activity Reports</u> .....	<u>15</u>
<u>Researching Activity Reports</u> .....	<u>15</u>
<u>Using the Committee Member, Leader and Instructor Roster</u> .....	<u>16</u>

## Introduction

Welcome to the club's online system! We will use this system to manage all aspects of our activities (trips, outings, courses, seminars, etc.) in the coming seasons. Many of you have probably already logged into your account in the new system and seen much of what it can do.

**Important!** There are two very important pairs of distinctions in the new online system to note: committees vs. activity types and activities vs. destinations.

- A **committee** is a group of people who make decisions and sponsor **activities**—the Seattle Branch Sea Kayaking Committee.
- An **activity type** is something that we do—hike, climb, bike, sail.
- A **destination** is a place and a route to that place that involves a specific **activity type**— The Tooth/S Face is a climb.
- An **activity** is a course, a seminar or a trip to a specific **destination** that is scheduled, organized and led by the leader of a **committee** on a given date—a hike to Summerland on September 4, 2005 led by Martin Mountaineer, a leader for the Seattle Branch Photography Committee.

After logging in, you will find five main areas that contain information and tools to help you manage your activities online.

**Logging In** Log in at [www.mountaineers.org](http://www.mountaineers.org) by entering your username and password in the boxes near the top left of the screen and clicking the  button. If you've never logged into your account, read and follow the first-time login instructions accessed by clicking the [Need help?](#) link next to the  button. Contact club staff at [clubmail@mountaineers.org](mailto:clubmail@mountaineers.org) or (206) 284-6310 if you have trouble logging in.

**My Profile** is accessed by clicking the  button in the menu at the left of the screen. Your profile page contains much information about you including your contact information and preferences, activities for which you are registered, activities in which you have already participated, courses in which you are enrolled or from which you have graduated, awards you have won, and committees on which you serve as a member, leader and/or instructor.

**Communities** are accessed by clicking the  button in the menu at the left of the screen. Each community contains three distinct areas: news, forums (discussion threads) and document archive. Many committees set up communities for committee business, leader information and each course that they sponsor. The communities are arranged by branch and then by a combination of committee and/or program (e.g. Tacoma: Hiking & Backpacking). You may subscribe to communities that you frequent to make access much easier and quicker as well as request email notification of new posts to the community.

**Activity Search** is accessed by clicking the  button in the menu at the left of the screen. This is where participants search and register for activities and research activity reports and where leaders list activities.

**Committees** are accessed by clicking the **Committees** button in the menu at the left of the screen or the committee name links in the **Committee Membership** table on your **My Profile** page. This is where you will find your entire committee roster including fellow leaders for committees on which you serve. Use the button in the menu and then the Show committees from: drop-down box at the top of the **Committees** page to find contact information for the committee chairs of all the club's committees. See the *Using the Committee Member, Leader and Instructor Roster* procedure at the end of these procedures for more information.

**Volunteer Tools** are accessed by clicking the **Volunteer Tools** button in the menu at the left of the screen. Here you will find reference material, useful forms to download and more help using the online system.

### **Overall Procedure for Scheduling an Activity and Filing Reports**

These are the things you'll need to do as leader to manage an activity in the new online system. Each item is discussed in detail on the following pages.

1. List an activity in the club's new online system.
2. Manage your activity roster and communicate with your participants.
3. Go have fun!
4. Update your activity roster and assign credit if the activity is associated with a course.
5. File an activity report.

### **Listing an Activity Online**




Note the online activity listing procedure at [www.mountaineers.org/main/volunteer/activity\\_build.html](http://www.mountaineers.org/main/volunteer/activity_build.html). This procedure is the general set of instructions for listing an activity in the club's new online system. It is a useful reference because it contains sample screen shots for each step in the process.

1. Log into your account and navigate to the **Activity Search** page.
2. Click on the Activity Setup link in the **Activity** box on the left side of the screen.
3. Choose the correct activity type from the Activity Type drop-down box or just type part of the destination's name in the Destination Name box. If you choose an activity from the Activity Type drop-down box, you'll be directed to a destination search screen with more search options. Choose options to narrow your search as you wish.

It is usually best to start with a wide search and narrow it than it is start with a narrow search that gives few or no results--choose one word that is part of the destination's name. For example, "burroughs" vs. "second burroughs" and "rainier" vs. "mount rainier," "mt. rainier," or "mt rainier." If the search results list is too long to browse, then you may wish to specify more search terms or words that are part of the destination name.

4. Once you see the destination for which you wish to create an activity, click on the title of that destination. If you cannot find the destination you desire, contact your committee chair or designated activity coordinator and ask them to create the destination you desire.

**Helpful Hint! When to use outing vs. trips:** An outing is an “umbrella” category for activities that are usually week-long or longer and will ultimately be comprised of several individual activities. For example, a week-long climb outing to Yosemite National Park is scheduled. Before, during or after the outing, the leader(s) may list individual climbs that are being or were done to assign credit to the participants if needed. The leader may also include a list of the individual activities in the activity report rather than listing the individual activities if desired.

5. At the top of the screen, you’ll see a list of future trips scheduled for this destination in the **Scheduled Activities** table. Please make sure that the dates you plan to schedule for this destination are not in conflict with an activity already scheduled. The destination details follow the list of schedule activities for the chosen destination. Please look them over to be sure you have chosen the correct destination.
6. If there are no conflicts and you have selected the correct destination, click the  button at the bottom of the screen. If you need to choose another destination, click the  button.
7. On the **Activity Setup** page that appears, enter the committee, branch, and begin and end dates in the appropriate boxes as required. Note that you may click on the  icon to view and choose dates from a calendar.

**Helpful Hint! Choosing Start and End Dates for Courses and Seminars:** The start and end dates for courses and seminars usually need to be the same. These dates need to be specified this way so that members may register for other activities in the same time period of longer courses. The only instance where the start and end dates should be different is when participants will be involved 24/7 between these two dates.

Example #1: The Alpine Scrambling Course starts on February 5 and runs until late October. The Start Date AND End Date are both 2/5/07.

Example #2: The Denali Expedition Planning Seminar has three week-night lectures in January and a field trip the first weekend in February. The Start Date is 2/3/07 and the End Date is 2/4/07. In this case, the field trip dates are the most important for the date conflict checking done when participants register for this and other activities.

8. If you are an activity coordinator click the Find activity leader link to search for and select the activity’s leader (your name should appear initially because you should log into your account, not the leader’s account for whom you are creating the activity).
9. Enter the correct leader and participant capacities. Leaders are the trip leader or co-leaders, assistant leader, mentored leader and may be students or graduates of a program. The participants are everyone else. Registration for leader or participant roster is based on the prerequisites listed in the destination’s details. Each roster must have a capacity of one or more; neither capacity may be set to zero. Also make certain that the total capacity does not

exceed the maximum allowed by the destination's jurisdiction. Below are some examples of how to choose rosters capacities for various types of activities. Please contact the clubhouse, [clubmail@mountaineers.org](mailto:clubmail@mountaineers.org) or (206) 284-6310, if you have questions about how to choose the capacities and how the prerequisites work.

### ***Helpful Hint! Examples of Roster Capacity Choices***

#### "Normal" Activity

Leader Roster - leader, co-leaders, assistant leader, mentored leader (probably only two people)

Participant Roster - everyone else

#### Scramble or Snowshoe

Leader Roster - leader, co-leaders, assistant leader, mentored leader, graduates

Participant Roster - students

#### Basic Climb

Leader Roster - leader, co-leaders, assistant leader, mentored leader, rope leaders

Participant Roster - students, graduates

#### Field Trip (one activity for students and instructors)

Leader Roster - leader, co-leaders, assistant leader, mentored leader, instructors

Participant Roster - students

#### Field Trip (one activity for instructors--could be good for the smaller courses where there are not choices for each FT)

Leader Roster - leader, co-leaders, assistant leader, mentored leader (probably only two people)

Participant Roster - instructors

#### Field Trip (two activities: one for students and one for instructors)

Instructor Activity Leader Roster - leader, co-leaders, assistant leader, mentored leader (probably only two people)

Instructor Activity Participant Roster - instructors

Student Activity Leader Roster - leader, co-leaders, assistant leader, mentored leader, instructors (probably only two people total)

Student Activity Participant Roster - students

Lectures may be set up like like FT's if needed. Probably use this to get instructors registered if needed for help with hands on parts of lectures.

10. Check the Leader's Permission Required or Sign Up With Leader or No Registration Required and/or Does this activity qualify for course credit? check boxes as needed based on the information below.

Leader's Permission Required: Select this option when you need to screen participants for activities that require much more than the average amount of skill or conditioning for that type of activity. Registration is based on the honor system; the participant must request

permission from the leader prior to registering. As part of the registration process, the participant is asked to check a box that states they have obtained the leader's permission.

**Sign Up With Leader:** Select this option if you want complete control of the registration process. Your activity will be listed like any other activity. Any participant that attempts to register will be given your phone and email and directed to contact you to register. As participants contact you to register, add them to the roster online (see the *Registering Participants for Your Activity* instructions below).

**No Registration Required:** Select this option if no registration is needed for this activity. Please be sure to adequately specify the meeting time and place for the activity and add any pertinent information in the Leader's Notes box (see Step 11 below). The activity will be listed online and potential participants will be told that no registration is required for this activity. You as the leader will be able to add participants to the roster so that you may change the leader of record or keep track of those who attended if desired.

**Does this activity qualify for course credit?:** Check this box if the activity is one for which students should get credit if they successfully complete the activity.

11. Enter information in the Meeting Time, Meeting Place, DriveTime, Pace, Other Info and Leader's Notes boxes as needed or desired.

**Other Info:** This field is a way to communicate an important piece of activity specific information to potential participants. This information (along with difficulty and pace) is displayed below the activity title in the activity search results table, so potential participants see this before they register. It is also a searchable field in the activity search so participants may use it to find specific "types" of activities (e.g. hikes for the Conditioning Hiking Series, hikes, scrambles or snowshoes that are Climb Conditioners, Mentor Group climbs). Look at the options in the drop-down menu for the choices. Choose the "See Leader's Notes" item if you wish to communicate information to potential participants that is not in the list of available choices.

**Leader's Notes:** This field is good way to provide specific information to and ask questions of participants. This information appears online by clicking on the activity's title wherever it appears and is part of the confirmation that is emailed to each participant. When they register online, participants may answer any questions you asked by entering information in the "**Notes** (if requested by leader)" field.

**Helpful Hint! Dressing Up Your Leader's Notes:** You may use HTML tags and Style Elements to format text in the Leader's Notes box. An *HTML and Style Elements Primer* is at [www.mountaineers.org/source/adestinations/leadernotes.html](http://www.mountaineers.org/source/adestinations/leadernotes.html).

**Helpful Hint! Information to enter in Leader's Notes for courses and seminars:** If you are listing a course or seminar, it is best practice to list the schedule and any other pertinent information for this instance of the course in the Leader's Notes. General information about the course that will not change often should be placed in the Destination Description.

12. Once you have entered all of the required and optional information, click the  button.

13. Enter the registration opening and closing dates and times. You may set the registration opening and closing date and time to whatever you wish. This could be five minutes before you plan to leave. So long as the activity is available for registration in the online system and the clubhouse is open for business, club staff will take registrations and cancellations by telephone.
14. If you are conducting an activity for which there is a fee (e.g. a course or seminar) enter appropriate information in the fee boxes based on the instructions below. Note that once the registration closes, you will no longer be able to edit the fee information. If you have any questions, please contact the clubhouse for advice, [clubmail@mountaineers.org](mailto:clubmail@mountaineers.org) or (206) 284-6310.

Member Fee: The amount to charge a Mountaineers member without a dollar sign (e.g. 100 or 100.00).

Non-member Fee: The amount to charge a non-member without a dollar sign (e.g. 150 or 150.00). Leave this field blank if this activity is for members only.

Cancellation Fee: This is an administrative cancellation fee. If you need to specify an additional cancellation fee to cover course expenses for those who cancel, contact the clubhouse, [clubmail@mountaineers.org](mailto:clubmail@mountaineers.org) or (206) 284-6310, for advice how to properly set this up.

Fee Collection:

If fee collection by "Seattle Office" is chosen:

All activities listed with fees are automatically submitted to the Seattle clubhouse in "frozen" status. Within 2 business days, the accounting department will assign the accounting distribution codes which will allow the activity to open for registration on the scheduled date.

All funds collected are automatically transferred to the branch's account.

Payment is required at the time of online registration. A member or guest may pay online with a credit or debit card, by phone to the Seattle office with a credit or debit card, by mail to the Seattle office with a credit or debit card or check, or in person at the Seattle office with a credit or debit card, check or cash.

If fee collection by any other method is chosen:

The sponsoring branch, committee and/or leader are responsible for the collection of fees, processing of refunds and proper accounting of all money.

Leader notes for collection: Any leader specific comment regarding fee collection for Fee Collection methods other than "Seattle Office." Note that this field is called Fee Arrangements on the activity detail display and edit web pages.

15. Click the  button.

16. Verify that all of the activity's details are correct and click the  button.

**Helpful Hint! Listing more than one activity for the same destination:** Once you've clicked the  button, you may click your internet browser's "back" button a few times to get back to the first activity data entry screen. Change the necessary information (usually just the activity dates and registration dates) by picking up at Step 7 above.

**Helpful Hint! Listing More than One Course Activity for the Same Leader on the Same Day:** You may need to create two activities for which you are the leader if you choose to have separate activity listings for the students and instructors for a field trip or if you plan to offer a choice of morning, afternoon and/or evening sessions of a training clinic. To do so (1) create an activity listing for one of the activities with all of the correct information, (2) create the next activity listing with everything correct except the year part of the activity start and end dates; make the year any year in the future except the year specified in the first activity you listed, (3) change the year in the listing created in Step (2) by editing the activity details (see *Editing the Details of an Online Activity Listing* below).

**Helpful Hint! Listing an activity for a date that is in the past:** Activities should be created before the scheduled activity, but there may be a need to list a back-dated activity to assign credit for a course activity that was part of an outing. For example, you may schedule a future climb outing to Yosemite National Park. When you return from that outing, you list all of the climbs that were done as a part of that outing to give the participants course credit for those climbs. To create such an activity, create the activity for a future date(s) and then edit the activity to change the date(s).

### **Editing the Details of an Online Activity Listing**

You can change most of the details of an activity online. This is a way to correct errors, add more notes, extend the registration period, etc. If you do make changes after registration opens, please contact participants who have already registered so they will be aware of the changes. If you are unable to change a detail online, contact club staff, [clubmail@mountaineers.org](mailto:clubmail@mountaineers.org) or (206) 284-6310, to request the change.

1. Log into your account and navigate to your **My Profile** page.
2. Click on the activity's title in the **Upcoming Activities** table.
3. Click the  button at the bottom of the activity detail page that is displayed.
4. Make the necessary changes and click the  button.

**Helpful Hint! Editing Activity Details When You Are a Co-leader:** Currently, only one "leader of record" may be specified for an activity. If you are a co-leader and need to manage an activity's details, use the link [www.mountaineers.org/source/aDestinations/Edittrip.cfm?activity=####](http://www.mountaineers.org/source/aDestinations/Edittrip.cfm?activity=####), where ####

is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the activity title link in your **Upcoming Activities** table. You will be able to edit the activity's details and change the destination using this "backdoor" method.



### **Changing the Activity Leader**

1. Log into your account and navigate to your **My Profile** page.
2. Click on the appropriate View Roster link in the **Upcoming Activities** table.
3. Use the Register another member link to add the new leader to the roster if they are not already on the roster. See *Registering Participants for Your Activity* below.

**NOTE:** To add the new leader, you may need to increase the leader roster capacity. If you plan to cancel from the activity, you may need to decrease the leader or participant roster capacity so that the total capacity does not exceed the permitted amount after adding the new leader and canceling yourself. See *Editing the Details of an Online Activity Listing* above.

4. Click the \* next to the leader's name to whom you are transferring the leadership.
5. Cancel yourself from the activity if necessary.

### **Changing the Activity's Destination**

1. Log into your account and navigate to your **My Profile** page.
2. Click on the activity title you need to edit in the **Upcoming Activities** table.
3. Click the  button at the bottom of the activity detail page that is displayed.
4. Click on the Change destination link at the top of the screen.
5. Search for the new destination on the search page displayed (refer to Steps 4-6 of *Listing an Activity Online* above).
6. Click on the title of the new destination in the list of search results presented.
7. Verify that no other leader has scheduled the destination that you are choosing.
8. Click the  button.

**Helpful Hint! Editing Activity Details When You Are a Co-leader:** Currently, only one "leader of record" may be specified for an activity. If you are a co-leader and need to manage an activity's details, use the link [www.mountaineers.org/source/aDestinations/Edittrip.cfm?activity=####](http://www.mountaineers.org/source/aDestinations/Edittrip.cfm?activity=####), where #### is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the activity title link in your **Upcoming Activities** table. You will be able to edit the activity's details and change the destination using this "backdoor" method.

## **Canceling an Activity Scheduled for a Future Date**



1. Log into your account and navigate to your **My Profile** page.
2. Click on the appropriate [View Roster](#) link in the **Upcoming Activities** table.
3. Note any participants who do not have an email address listed. You need to contact them by some other means so that they know the activity has been cancelled. It may be best to export a copy of the roster before canceling. See *Viewing and Using Your Activity's Roster* below.
4. Click on the [Click here to cancel this activity](#) link at the top of the roster page.
5. Make sure the Check if this activity was cancelled: box is checked.
6. Enter a message that will be emailed to participants in the text box.
7. Click the  button.
8. File the activity report to show that this activity was cancelled (see *Filing and Editing Activity Reports* below).

**Helpful Hint! Do you just need to change the destination?** If you are going somewhere else because of weather, for example, you may only need to change the destination for you activity rather than canceling the activity and creating a new one. Use the *Changing the Activity's Destination* procedure above if the date and roster for your activity are not changing substantially. This will save you the time needed to create a new activity listing and re-enter the entire roster.

## **Registering Participants for Your Activity**

Once you have scheduled an activity, you may add participants to the leader and participant rosters.

1. Log into your account and navigate to your **My Profile** page.
2. Click on the appropriate [View Roster](#) link in the **Upcoming Activities** table.
3. Click the [Register another member](#) link at the bottom of the roster page that is displayed.
4. Enter the name (last, first) of the member you wish to add in the Name box and click the  button. Note that you may enter part of the last name or the entire last name and part of the first name (e.g. "Mountai" or "Mountaineer, Ma" to find Martin Mountaineer).
5. Choose the correct person by clicking once on [their name](#) in the pop-up box containing the list of names that match your search criteria.


6. Click the Asst. Leader / Rope Leader or Participant Registration radio button to register the person on the correct part of the activity roster. See Step 9 of *Listing an Activity Online* above for guidance on these two parts of the activity roster.
7. Click the  button.
8. Enter the participant's carpool preference if known and click the  button.
9. Click the Register another member link on the confirmation page that appears to continue adding participants.

**Helpful Hint! Moving a person from one roster to another.** If you need to move a person from the participant roster to the leader roster or *visa versa*, cancel the person in question (see *Canceling Participants From Your Activity* below) and then re-register them using the procedure above.

**Helpful Hint! Using an Activity Roster When You Are a Co-leader:** Currently, only one "leader of record" may be specified for an activity. If you are a co-leader and need to manage an activity roster, use the link [www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####](http://www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####), where #### is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the activity title link in your **Upcoming Activities** table. You will be able to view and use the roster, register and cancel participants, and view the carpool roster using this "backdoor" method.

### **Canceling Participants From Your Activity**

Once you have scheduled an activity and participants have registered or been registered, you may cancel them.

1. Log into your account and navigate to your **My Profile** page.
2. Click on the appropriate View Roster link in the **Upcoming Activities** table.
3. Click the ✕ icon to left of the name of the participant to be canceled.
4. Enter any appropriate comments in the box at the bottom the **Confirm Activity Cancellation** screen that is displayed. Note that these comments will be emailed to the participant as part of a cancellation confirmation email.
5. Click the  button.

**Helpful Hint! Using an Activity Roster When You Are a Co-leader:** Currently, only one "leader of record" may be specified for an activity. If you are a co-leader and need to manage an activity roster, use the link [www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####](http://www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####), where #### is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the activity title link in your **Upcoming Activities** table. You will be able to view and use the roster, register and cancel participants, and view the carpool roster using this "backdoor" method.

## Viewing and Using Your Activity's Roster

**Finding the Roster:** Log into your account and navigate to your **My Profile** page. Click on the appropriate [View Roster](#) link in the **Upcoming Activities** table. You may print this page, send your participants an email message, download a file containing their information (contact info, carpool preference, courses, waiver, etc.), and view the carpool roster (see *Viewing the Carpool Roster* below).

**Sorting the Roster:** Select the appropriate radio button at the top of the roster to sort the list by Name or Registration Order.

**Selecting Participants to Email or Include in an Export:** Click the link [Select/deselect](#) all link at the bottom of the right-most column, called Send email? for each group (leader and participant registration and waitlist rosters) to select or deselect all of the participants in that group. Click the individual check boxes in the Send email? column to select or deselect individual participants.

**Emailing Selected Participants:** Click the Email all selected members radio button and click the  button. Type your subject and message in the appropriate boxes, attach up to one file using the  button and click the  button. Note that the email is web-generated. It does not send a copy of the message to you unless your email address is included in the To: box of the email message being sent.

**Exporting Selected Participant Information:** Click the Export selected members radio button and click the  button. Click the [MemberExport.csv](#) link to download the file to your computer. Choose to open or save the file as desired. Note that this file is a comma-delimited text (CSV) file that will likely contain more information than you need and may be opened by many spreadsheet and database programs.

**Helpful Hint! Using an Activity Roster When the Activity is in the Past:** When your activity is in the past, the listing is moved from the **Upcoming Activities** table to the **Activity History** table on your **My Profile** page. To view the roster is such a way to email participants or download their contact information before completing the "update roster/credits process, use the link [www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####](http://www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####), where #### is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the [Update Roster/Credit](#) or [File Activity Report](#) link in your **Activity History** table. Once the "update roster/credit" process is complete, the [Update Roster/Credit](#) link will be changed to the [Activity Roster](#) link that will allow you to view the roster, email participants and download their contact information.










**Helpful Hint! Using an Activity Roster When You Are a Co-leader:** Currently, only one "leader of record" may be specified for an activity. If you are a co-leader and need to manage an activity roster, use the link [www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####](http://www.mountaineers.org/source/aTrips/TripLeaderRoster.cfm?activity=####), where #### is the Activity ID. You may obtain the Activity ID for activities in the past by clicking on the [activity title](#) link in your **Upcoming Activities** table. You will be able to view and use the roster, register and cancel participants, and view the carpool roster using this "backdoor" method.

## Viewing the Carpool Roster

Carpools for all activities are organized by club staff one business day prior to the activity. The carpool is organized in the morning and is available to leaders and participants by 1:30 p.m. at the latest that day.

To view the carpool roster for your trip, log into your account and navigate to your **My Profile** page, click on the appropriate [Carpool Info](#) link in the **Upcoming Activities** table.

## Updating Your Roster and Assigning Credit to Students After the Activity

1. Log into your account and navigate to your **My Profile** page.
2. Click on the appropriate [Update Roster/Credits](#) link in the Leader column of your **Activity History** table.
3. If the activity was cancelled, check the Check if this activity was cancelled box at the top of the screen.
4. Use the [Register another participant](#) link to add any last-minute additions to the activity roster.
5. Use the [remove from roster](#) link to cancel participants. If this was an activity that required payment, check the Refund? box and list the amount to refund and any comments in the Refund Notes text box if you wish to authorize a refund to the participant being cancelled.
6. Use the  icons to add participants who were on the waitlist or had been cancelled but attended.
7. If you need to change the activity leader, click the  icon to the left of the name of the leader to whom you are transferring leadership duties (note that the  icon indicates the activity leader). At this point, you may wish to click the  button so that the new leader may complete the Update Roster/Credits and Activity Reporting filing processes.
8. If credit may be obtained for successfully completing this activity, use the [Select/deselect group](#) links and/or check the boxes under the Process course credit? column to assign credit to those participants who successfully completed the activity.
9. If you need to change any of the activity's details, click on the [Edit activity details](#) link at the top of the screen. Make the necessary changes and click the  button.
10. Click the  button if you wish to check your work later before submitting it. If it is ready to submit, click the  button. Clubhouse staff will finalize the closing within one business day to archive the activity's roster and credit assignments.
11. After clicking either the  or  button, you'll be taken to the **Activity Report** screen where you may enter the detailed results from your activity.

**Helpful Hint! I need to correct roster/credit information that I submitted.** Call or email club staff ASAP, (206) 284-6310 or [clubmail@mountaineer.org](mailto:clubmail@mountaineer.org). When you submit a roster and credit for processing, the activity is put into “limbo.” Club staff runs the closing/archiving routine within one business day of the submission. If you catch the error and inform club staff know before the closing routine is run, they can return the activity roster to your control for editing. If the activity roster has already been closed by club staff, let them know by email what changes need to be made. They can make corrections via a “backdoor” method.

## **Filing and Editing Activity Reports**

1. After clicking either the **Save For Later** or **Submit And Close** button during the Update Roster/Credits process, you’ll be taken to the **Activity Report** screen where you may enter the detailed results of your activity.

If you did not file the activity report immediately after you filed the roster and assigned credits or if you need to edit the activity report, log into your account and navigate to your **My Profile** page. Click on the [File activity report](#) or [View activity report](#) link next to the appropriate activity title in the Activity Name column of your **Activity History** table.

2. If empty boxes are present, enter appropriate information in them and click the **Submit** button. If there are no empty boxes, click the **Edit** button at the bottom of the screen, enter appropriate information in the boxes and then click the **Submit** button.

**NOTE: Information entered in the “Incident Reporting” and “Confidential Participant Performance Notes” boxes is kept CONFIDENTIAL.** It will NOT be displayed to anyone viewing the activity report. Information entered in the “Incident Reporting” box is forwarded to the Executive Director, BOT Safety Committee Chair, and the sponsoring committee’s chair. It is also stored in the database for later data analysis. Information entered in the “Confidential Participant Performance Notes” box is forwarded to the chair of the committee that sponsored the activity and stored in the database.

## **Researching Activity Reports**

### Option 1 – Destination Search Method

This is the best option because it provides an excellent summary of the activity reports available as a table with activities listed from most recent to least recent.

1. Log into your account and navigate to the **Activity Search** page.
2. Click on the [Activity Setup](#) link in the **Activity** box on the left side of the screen.
3. Type part of the desired destination’s name in the Destination Name box. If you choose an activity from the Activity Type drop-down box, you’ll be directed to a destination search screen

with more search options. Choose options to narrow your search as needed. Do remember that it is usually best to start with a wide search and narrow it than it is start with a narrow search and end up with little or no results.

4. Once you see the destination for which you wish to find activity reports, click on the title of that destination.
5. At the top of the screen, you'll see a list of future activities scheduled for this destination in the **Scheduled Activities** table and a list of activities for this destination for which activity reports have been filed in the **Activity Report Summary** table. Click on the View activity report link next to the activity report you wish to view. The last table on this screen, **Destination Details**, contains information about the destination like maps, guidebooks and route description.
6. When you are finished viewing the activity report, you may click you internet browser's "back" button to return to the destination information screen if you wish to view more activity reports for that destination.

### Option 2 – Activity Search Method

This method searches the activity database and provides links to the activity reports. The activity database contains activities with start date of 1/1/2003 and later. There may be activity reports in the system for activities earlier than this if information was imported from other sources (see Option 1).

1. Log into your account and navigate to the **Activity Search** page.
2. Click the Advanced Search link at the left of the screen if you need more specific search criteria.
3. Check the Search for **past** activity rosters/reports checkbox.
4. Enter an appropriate date range for your search.
5. Enter any other search criteria to help narrow your search for the activities for which you wish to view activity reports.
6. Click the **Search For Activities** button.
7. Click on the View Activity Report link for the activity report you wish to view.

### Using the Committee Member, Leader and Instructor Roster

**Committee Rosters** are where you will find fellow members, leaders and instructors for committees on which you serve. After logging in, they may be accessed two ways:

*Option One:* Click the [Committees](#) link in the left menu bar, then choose from the Show committees from: drop-down box items at the top of the Committee page to find contact information for the committee chairs of the club's committees and divisions, then click the desired link in the committee column. Only committees on which you serve appear as a link.

*Option Two:* Click on the [committee name](#) link in the Committee Memberships table on your My Profile page. Though your entire committee service history is here, only committee on which you are currently a member, leader or instructor will appear as a link.

**Sorting the Roster and Selecting Members:** Use the Display Positions check boxes at the top of the page to view the desired committee members, leaders and/or instructors. Once you've made these selections, click the  button. Click the link [Select/deselect all](#) link at the bottom of the right-most column, called Select, to select or deselect all of the members in the list you just specified, or use the check boxes in the Select column to choose which members you wish to contact.

**Sending an Email to All Selected Members:** Click the Email selected members radio button and then click the  button. Type your subject and message in the appropriate boxes, attach up to one file using the  button and click the  button. Note that the email is web-generated. It does not send a copy of the message to you unless your email address is included in the To: box of the email message being sent.

**Exporting a File that Contains Contact Information for the Selected Members:** Click the Export selected members radio button and click the  button. Click the [MemberExport.csv](#) link to download the file to your computer. Choose to open or save the file as desired. Note that this file is a comma-delimited text (CSV) file may be opened by many spreadsheet and database programs.

**NOTE:** If a person serves in multiple committee positions (e.g. member, leader and instructor) they must have multiple committee records, one for each Position. The Notes column may contain information about the duties or subcommittee roles of committee personnel (e.g. Field Trip Coordinator, Equivalency Coordinator) or any other information useful to the committee.



The Mountaineers

7700 Sand Point Way NE

Seattle, Washington 98115

206-521-6001

## RELEASE AND INDEMNITY AGREEMENT

I, \_\_\_\_\_ hereby state that I wish to participate in courses and/or activities offered by The Mountaineers, a non-profit corporation. I recognize any outdoor activity may involve certain dangers, including but not limited to the hazards of traveling in mountainous terrain, accidents or illness in remote places, force of nature, and the actions of participants and other persons. I further understand and agree that without some program providing protection of its assets and its leaders, The Mountaineers would not be able to offer its courses and activities.

In consideration of and as part payment for the right to participate in the activities offered by The Mountaineers, I agree to RELEASE, HOLD HARMLESS AND INDEMNIFY The Mountaineers and its members from any and all liability, claims and causes of action arising out of or in any way connected with my participation, or the participation of any minor that I am signing on behalf of, in any activities offered by The Mountaineers. I personally assume all risks in connection with these activities. If I am signing on behalf of a minor, I further agree to HOLD HARMLESS AND INDEMNIFY The Mountaineers and its members from all liability, claims and causes of action which the minor may have arising from the minor's participation in activities. The terms of this agreement shall serve as a release and indemnity agreement for my heirs, personal representative, and for all members of my family, including any minors. (Parents or legal guardians must sign for all persons under eighteen (18) years of age.)

**I have read this release and indemnity agreement and have fully informed myself of its contents before I have signed it.**

Signature of Participant

Date

Signature of Parent or Guardian If Participant Is Under 18 Years Of Age

Date

## DRAFT—02-21-11

### Useful Links for Kitsap Branch Hike and Snowshoe Leaders as of 02-21-11

## Weather

Hurricane Ridge webcam:

<http://www.nps.gov/olymp/photosmultimedia/hurricane-ridge-webcam.htm>

Northwest River Forecast Center 10 Day Outlook (an excellent graphical depiction of anticipated rainfall and temperatures over the entire Northwest—gives you the quick, big picture of where it is likely to be raining and not raining for each of the coming 10 days:

[http://www.nwrfc.noaa.gov/weather/10\\_day.cgi](http://www.nwrfc.noaa.gov/weather/10_day.cgi)

National Weather Service pages:

Excellent detailed analysis of anticipated weather factors expected to affect our area:

[http://www.wrh.noaa.gov/total\\_forecast/getprod.php?wfo=sew&pil=afd&sid=sew](http://www.wrh.noaa.gov/total_forecast/getprod.php?wfo=sew&pil=afd&sid=sew)

Detailed NWS mountain area forecasts for the Olympics and Cascades:

<http://www.wrh.noaa.gov/sew/forecast03.php>

Surface Observation Map gives detailed weather conditions from individual reporting stations throughout Washington, including a number of automated sites in the Olympics, such as Hurricane Ridge, Buckinghorse Ridge, Waterhole on Obstruction Point Road, the Dungeness Snotel, etc.

<http://www.wrh.noaa.gov/mso/fwxmaps/ksew.php>

Northwest Weather and Avalanche Center (NWAC). Absolutely essential to check this site before any winter travel in the mountains

<http://www.nwac.us/>

Snotel link that provides detailed snow depth and other weather data remotely from Snotel sites around Washington:

<http://www.wcc.nrcs.usda.gov/snotel/Washington/washington.html>

## **Trail, Road and Backcountry Travel Conditions:**

Olympic National Forest, Hood Canal District:

<http://www.fs.fed.us/r6/olympic/conditions/hood.shtml>

Hurricane Ridge, current winter road conditions:

<http://www.nps.gov/olym/planyourvisit/hurricane-ridge-current-conditions.htm>

complete daily recording of Olympic National Park road conditions, call (360) 565-3131

Olympic National Park Trail Conditions:

<http://www.nps.gov/olym/planyourvisit/wilderness-trail-conditions.htm>

There are a number of sites for hikers, climbers and backcountry skiers that have very current reports on backcountry travel conditions posted on a daily basis:

<http://www.wta.org/>

<http://www.nwhikers.net/>

<http://cascadeclimbers.com/>

<http://turns-all-year.com/>

The Olympic Mountain Rescue Climber's Guide site supplements their book:

<http://www.climbersguideolympics.com/>

## **MAPS**

Olympic National Park roads, trails and campsites, with point-to-point mileage (PDF):

<http://www.nps.gov/olym/planyourvisit/upload/WildernessMap.pdf>

This website (Acme.com) allows you to switch easily to and from USGS topo maps, shaded terrain depictions, and satellite images for any area that you choose (just enter the coordinates or a place name in the boxes at the bottom right of the screen:

<http://acme.com/mapper/>

USGS site for downloading free USGS topo maps:

[http://store.usgs.gov/b2c\\_usgs/usgs/maplocator/\(ctype=areaDetails&xcm=r3standardpitrex\\_prd&area=%24ROOT&layout=6\\_1\\_61\\_48&uiarea=2\)/.do](http://store.usgs.gov/b2c_usgs/usgs/maplocator/(ctype=areaDetails&xcm=r3standardpitrex_prd&area=%24ROOT&layout=6_1_61_48&uiarea=2)/.do)

Site for downloading snow park maps for winter recreation

<http://www.parks.wa.gov/winter/trails/mapdownloads/>

maps of specific dnr lands

[http://www.dnr.wa.gov/RecreationEducation/Topics/TrailsMapsFacilities/Pages/trail\\_maps.aspx](http://www.dnr.wa.gov/RecreationEducation/Topics/TrailsMapsFacilities/Pages/trail_maps.aspx)

x

site for download individual maps of Olympic National Forest trails - pdf formats

[http://www.fs.fed.us/r6/olympic/recreation-nu/trails\\_1.shtml](http://www.fs.fed.us/r6/olympic/recreation-nu/trails_1.shtml)