



# BE OUTDOORS APPALACHIAN MTN CLUB

## Outdoor Leadership Institute Online Risk Management & Leadership Requirement Guidelines Training - Questions & Answers

May 8th, 2020

*Disclaimer: Risk Management and Leader Liability standards and practices are constantly evolving. Reference the Outdoor Leader Handbook for further clarification and guidelines, and check in with your chapter Leadership Chair or with the Risk Management and Leadership Training Department ([leadership@outdoors.org](mailto:leadership@outdoors.org)) for the most up-to-date information.*

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## Questions Relating to Leader Liability

### Question - Members in Good Standing

“What does “Leaders must remain in good standing” actually mean?”

*(page 51 of the Outdoor Leadership Handbook)*

### Answer

It means that the leader has upheld the Leadership Requirements and Guidelines, including following the Code of Conduct, AMC financial policies, etc. To understand the kinds of things that could affect a leader’s good standing, read through the Code of Conduct which includes examples of misconduct and details about how AMC manages and addresses concerns if they arise.

It’s important for AMC leaders to know that we have a coaching and mentoring approach to working with volunteers. This means that we acknowledge that we can all make mistakes and we all have something to learn. When we receive reports of problems, we work with leaders to resolve issues together and move on to better performance.

From time to time, some individuals do not want to follow the code of conduct. If they are a volunteer, they may have their status changed to ‘suspended’. In serious situations, the status can be ‘revoked’. Those would be examples of a volunteer who is not in good standing and therefore cannot be assigned Leader status in AMC.

### Question - Overstepping AMC’s Liability Coverage

“Please provide a few examples of how a Volunteer Leader might, perhaps unknowingly, overstep the boundaries of the AMC liability coverage and, thereby, place themselves at risk.”

### Answer

If **you** were **under the influence** of drugs or alcohol. If gross negligence exists (conscious & voluntary) or reckless misconduct (intentional act in violation of duty). If the **leader is not a current member**. If the leader does not list their activity in the activities database.

### Question - Can Volunteer Leaders Be Sued

“What is a situation in which a participant could sue a leader?”

### Answer

Lawsuits against the AMC are rare, and when they do occur, they typically occur against the AMC and not the volunteer leader.

## AMC Online Risk Management & LRGs Q & A

By keeping in line with the OLDC's Leadership Requirement and Guidelines you are covered by the AMC's general liability coverage. Following that document, leading trips that are well within your ability and only offering medical advice or treatment that is within your scope of training, and following the AMC's Code of Conduct, Sexual Harassment policy, our guidance on American's with Disabilities Act (ADA) and our Essential Eligibility Criteria are all great steps that protect us from lawsuit.

The Federal Volunteer Protection Act is legislation designed to remove the name of a volunteer from a lawsuit. If you are operating a licensed craft (such as a car or boat), under the influence of alcohol or drugs, or receive \$500 in compensation in any form, this legislation will not protect you.

### Questions - Compensation and Being Covered

"I realize that the leaders cannot be reimbursed for expenses beyond their direct trip expenses, but did not realize that there was a limit on the amount of such "compensation" that a leader could receive per year. During one of the previous training sessions, someone had provided a dollar limit for such compensation?"

"What if you get room and board for leading at a camp valued at over \$500. Are you covered?"

### Answer

The threshold of \$500 of in-kind value is specifically related to a provision within the Volunteer Protection Act. A "volunteer" is defined under the act as an individual performing services for a nonprofit organization or a governmental entity who does not receive compensation (other than reasonable reimbursement or allowance for incurred expenses) or any other thing of value in lieu of compensation, in excess of \$500 per year.

While a volunteer who receives room and board, a subsidized trip or other "compensation" valued \$500 or more in exchange for volunteering would not be able to use the Volunteer Protection Act as an affirmative defense against a claim, there are numerous other layers of protection to shield volunteers. Additional potential defenses include state specific volunteer immunity statutes and the enforceability of well crafted Acknowledgement of Risk and Release Agreements.

Regardless of the in kind value of goods and services received in exchange for volunteering, the limits of AMC's general liability insurance coverage (including defense costs) would also be extended to specific volunteers in the unlikely event that they are named as a defendant in civil litigations following acting in good faith in an official capacity on behalf of AMC.

### Question - Amount of General Liability Coverage & Vol Protect. Act

“Does the signing of the Acknowledgement of Risk Form in combination with the AMC's general liability insurance and the federal volunteer risk law completely protect a group leader from liability in a lawsuit resulting from an incident on a trip they were leading?”

### Answer

A person engaged in leading outdoor activities **owes a duty of care to its participants/customers** but is not always liable for injuries that occur in the course of a program. An important limitation on liability comes from the doctrine of “assumption of risk” or “inherent risk.” In most, if not all states, there is no duty to protect a person from a risk which is inherent in the sport or recreational activity or any liability for injuries resulting from such risks.

The Volunteer Protection Act applies to an uncompensated volunteer for acts of ordinary negligence committed within the scope of the volunteer's responsibilities. **Protection under VPA does not apply if the volunteer engages in willful or criminal misconduct, gross negligence, reckless misconduct, or a conscious, flagrant indifference to the rights or safety of the individual(s) harmed by the volunteer.** The VPA also does not apply if the volunteer causes harm by operating a motor vehicle, vessel, aircraft, or other vehicle for which the state requires its operator to possess an operator's license or maintain insurance.

### Question - Gen. Ins. Coverage and ADA Cases

“Expand on case(s) where participants can sue AMC or the AMC's Volunteer Leader. I understand that all AMC's VL are protected by the General Liability Insurance as long as the Volunteer Leader acts in accordance with the AMC's Leadership Requirements and Guidelines (will provide legal counsel), but other cases: such as issues when involvement with youth; participant with a Service Dog that is unclear, and ADA cases.”

### Answer

Giving direct guidance and answers to these topics is incredibly complex and also dangerous because of how case-by-case they are. With regards to “involvement with youth”, the simplest answer is to never be alone with a single youth, which is a sweeping recommendation across all of AMC's programs. Always reach out to Risk Management & Leader Liability at [leadership@outdoors.org](mailto:leadership@outdoors.org) anytime you have questions specifically around service dogs and the ADA, and the Essential Eligibility Criteria.

**Question - 'Shuttling' Participants**

“How are others handling the liability associated with shuttling participants?”

**Answer**

Your own auto policy would cover this kind of liability.

**Question - Have Volunteer Leaders Been Sued**

“How many times has AMC volunteers as a whole been suited in the past 5 years?”

**Answer**

None

**Question - Updating the Volunteer Release Agreement**

“Does the Volunteer Release Agreement (VRA) get revised, if so how often?”

**Answer**

It does get revised as AMC’s legal counsel and insurance company see a need. The last time was about two years ago.

## Questions Relating to Safety Equipment & Accidents

### Question - Leader Efforts Surrounding First Aid

Who pays for: “Leaders must make reasonable efforts to ensure that appropriate safety and first aid equipment is available during their Activity.”

*(page 52 of the 2020 Outdoor Leadership Handbook)*

### Answer

You and or your co-leader provide group first aid gear. As for personal equipment such as PFDs, climbing harness, etc... It should be stated that participants must provide their own Personal Protective Equipment (PPE), which they should know how to use, be of correct size/fit and in good condition.

### Question - Recommendations for Action When an Injury Occurs

“Let’s say you are on a day hike with 10 beginner level hikers and you are at the apex of a 5 mile in and out hike (so 2.5 miles from the cars) and a hiker falls, significantly twists an ankle, and can’t walk. There is no co-leader on the hike. What’s the best approach? Do we all wait until help arrives and walk out together? Does the leader wait with the injured person and have the most experienced person lead the group out and hope for the best? Does the leader ask for a volunteer to stay with the injured person and then the leader leads the rest of the group out and returns to the injured person? Or something else.”

### Answer

What’s the best approach? “It depends” as we like to say when we are teaching this topic in person. The best approach depends on a lot of things, time of year, temperature, weather conditions, difficulty of terrain back to cars or ahead of the group, fitness of the group, kind of injury, etc. You have a great question, but there are many, many variables and there are no 100% “correct” answers for all the questions you posed. To begin with, your “beginner hikes” would be in a place that has cell service and never in a remote area that lacks cell service.

From Chris Fogarty: “For conversation purposes on your question, I will assume the following: Summertime - not too hot, not too cold, long days, good weather, no precipitation, the timing of this accident is noon time. Group is of good reasonable fitness for a beginner group, and none have any underlying health conditions that would need maintenance, such as diabetes, heart conditions, that everyone has the appropriate gear to be outside for a long day, there are no children or participants with service animals on the trip.”

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Here's the "WWCFD" what would Chris Fogarty do:

1. At the start of the trip I would have assigned a co-leader or someone else to help you with group management. I never run a trip without a co-leader. Two heads always make better decisions than one in decision making scenarios. In my trips, we go into the woods as a group and out as a group. Splitting the group severely restricts your available assets and I want to keep as many people as I can with me to help. Generally speaking, and it is my experience from trips that I have been on where someone has gotten hurt, folks want to be around to help and nobody wants to just ditch the group.
2. Follow accident scene management protocol. Reference the document you worked on with Jon Niehof in your Accident Scene Management session in addition to any emergency action plan or crisis communication chart you have set up with your chapter.
3. Attempt a self-rescue. It is always best for the group to self-rescue. A self-rescue will mean that we will proceed after the situation has been initially managed, at an extremely slow pace to return to the cars. I may, depending on the coming terrain, the resources I have in the group, just give the local police/rescue authority a heads up to let them know I have an injury and I'll be self-evacuating. I would determine an update interval and update them of our progress as we go along. I would have the injured person contact their "at home person" and let them know what is going on.
4. If a self-rescue can't be performed, I would proceed according to the accident scene management protocol.

Here's a link to a great video from the RI hiking club that describes a self rescue in the whites. It's a great case study! <https://www.youtube.com/watch?v=eqBeHAX87dl&t=34s>

### Question - Leader Requirement for Maintaining Group Safety

"In all instances, the AMC places the physical well-being of Activity participants first, regardless of the requirements and guidelines listed in this document, including those associated with insurance coverage" - I interpret this as meaning that. "If things go south... Do what you have to do to keep people safe, and you will still be covered by the insurance." Is this the correct interpretation?"

### Answer

Correct. Keep the group as safe as possible, to the best of your ability, given the circumstances available.

### Question - Documentation of Incidents on Trips

“If an incident occurred during a trip I am leading, after dealing with the immediate situation is there a form or some process for documenting what occurred?”

### Answer

Yes, you should always carry the AMC Incident Report form (a good place to store it is in your first aid kit) and fill it out with as much detail as you can and as quickly as you can after the “immediate situation” is over. You should submit the report to AMC Risk Management. Here is a link to the form: <https://www.outdoors.org/wp-content/uploads/pdf/vol-incident-report.pdf>

### Question - Having Witnesses On Injury Report

“Should a witness list be part of an incident report where there is injury?”

### Answer

Yes. You should put a witness list with contact info on the back of the incident report.



## Outings That Include Dogs

### Questions About Participants Having a Fear of Dogs

“One of our members is deathly afraid of dogs, another signed up for the same activity and informed me she was bringing a support dog . How to handle it?”

“Recently, I led a trip in which one participant asked to bring a service dog, which I know is acceptable under the AMC rules. This was a new member. We had another member who hiked with us often who is terrified of all dogs, even on a leash. I was not sure how to handle this situation in order to be inclusive to both members. It turned out that the second person notified me that she was not going to attend - problem solved. What about the next time when there are competing concerns?”

### Answer

You should confirm that the dog is an emotional support dog and not a service dog.

Service Dogs are trained to perform tasks and to do work that eases their handlers' disabilities. Working as part of a team with their disabled partners, service dogs help them attain safety and independence.

Despite thorough training, registration and the therapeutic benefits therapy dogs (support dogs) provide, they do not have the same jobs or legal designation as service dogs.

Fear of dogs is not a valid reason for denying access or refusing service to people using service animals.

Having allergies is also not a valid reason to have a person with a service dog not participate in an outing. If a person is at risk of a significant allergic reaction to an animal, it is the responsibility of the leader to find a way to accommodate both the individual using the service animal and the individual with the allergy.

If the dog is an emotional support dog, you as a leader have the right to refuse the animal coming on the outing. If you feel it's important to have both participants on your outing, hopefully you would be able to find a reasonable accommodation that works for both parties.

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Here's the link to the AMC policy on service dogs:

<https://cdn.outdoors.org/wp-content/uploads/2019/02/22115026/FINAL-Service-Animal-Guidelines-for-AMC-Volunteers.pdf>

Notes on Including Service Animals:

- Our overarching aim with respect to a service animal is to include them provided they are fit enough, have appropriate equipment/food, and the trip is reasonably suitable for dogs.
- Know the regulations of the Land Manager. Land Managers that offer public access generally must accommodate service animals even when they do not allow pets. Confirm any requirements with respect to leashing. We must uphold the regulations of the land managers.
- There are situations where a service animal cannot be included:
  - Safety/Preparedness of the service animal. Does the animal have suitable fitness and protective equipment (feet, temperature) to attend the trip that is planned? You can ask the same questions that you might ask a participant such as, How has the service animal prepared to walk ten miles? See below for more on screening.
  - Can the animal perform the necessary physical activities to participate or would the very nature of the trip planned compromise the safety of a dog? For example, terrain, weather, or trails with ladders, may not be safe or even possible for a dog to manage.
- **Most importantly, when we include the service animal, we include the person and this makes the dog part of the group. We cannot require someone with a service animal to walk at the back of the group. We cannot send out a message to all participants to inform them that we are including a service animal. If participants arrive and decide they cannot be in the company of the service animal, they can choose not to participate.**
- Comfort Animals or Therapy Dogs are not considered service animals by the Americans with Disabilities Act.

### Question - Screening and Accepting Animals on Outings

“How is an Aide covered in a pre-trip screening?”

#### Answer

Here is basic advice for screening for dogs:

- Screen the dog(s) according to similar criteria as participant(s) (preparedness, fitness, protective equipment, etc.).
- Gear list should address the needs of the dog(s): food, water, first aid, protective equipment, etc.
- Require owners to observe Leave No Trace principles and pick up/carry out any waste.
- Be very clear about leashing expectations.
- Where lodging is included as part of the event, be clear about expectations regarding accommodation of the animal. For example, animals must remain with their owner at all times. Indicate if there are areas where pets cannot go, and the owner will have to stay with the pet such as a restaurant (this may not apply to a service animal).

### Question - Issues with Animals on Outings

“What happens if a service animal is the chosen aide and if the animal starts to struggle/have difficulties during the trip? Would the entire group turn back at that point?”

#### Answer

The short answer is, if the leader has screened and included the pet or service animal, they are part of the group. *Screen the dog(s) according to similar criteria as participant(s) (preparedness, fitness, protective equipment, etc.)*

From a practical standpoint, you cannot tell the dog to go back alone, so if the safety standard of the day warrants that ‘if one turns back we all turn back’ then the dog can be the one who requires the group to turn back.

## Removing Participants and Participants Departure During a Trip-in-Progress

### Question - Participants Leaving Trips in Progress - Voluntary or Involuntary

There are a number of factors that could represent how/why a person wants to leave or has to be removed from a trip. Every situation is different. Setting expectations through trip planning, screening and pre-trip talks are the key ways to reduce the incidence of participant removal from trips. Additionally, communication is a key factor in all participant interactions that may involve the voluntary or involuntary removal of a participant from a trip. **It's important to note that a person just "wanting out" of a trip is a rare occurrence.**

As a leader, you will have developed some rapport with the person desiring to leave during your time on the trip and it is highly likely that you will have some kind of indication that something is going on with the person prior to their announcement that they would like to leave the trip in progress. As a leader, you would do your best to make sure that the person is able to leave the trip in as safe a manner as possible.

If a participant needs to leave or has to be removed from a trip, a conversation would need to be had with the leader, co-leader and the participant in question to determine what the issues are. Removal would be handled in as safe and discreet manner as possible to protect all parties. In all cases, if a person leaves a trip, the person who is leaving must sign a simple statement stating their intention to leave the trip. As the leader, you can write this statement on the back of the waiver form. The Leader and a witness (co-leader or other 3rd party on the trip) must sign also. If the person refuses to sign the statement, that must be acknowledged as well, in writing on the back of the waiver form and witnessed by a 3rd party. Regardless of whether the person leaving the trip voluntarily or not, you should fill out an incident report, document the incident/issue as completely as possible and submit a copy of the waiver, incident report and a copy of the waiver (both sides - the one with the simple statement and the one with the waiver) to leadership@outdoors.org. A general announcement will be made to the group about the person's departure. You should (as the leader) offer to walk the person back to the parking lot. The person has the right to refuse assistance since they are no longer a part of the group, in which case, you would let them go on, on their own power and direction.

### Question - Screening Out Participants at “Trailhead”

“If you’ve screened a participant but they show up at the trailhead obviously unprepared (e.g. poor footwear choice, inadequate or poor equipment choices) can you remove them from the trip at that point, and is there a tactful way to do that?”

### Answer

Depending on the poor choices (example: wearing cotton on a hot summer’s day hike if you’ve required non-cotton clothing - where the weather is forecasted to be sunny and hot all day), you **could** take the risk and allow them to attend as is, or inform them that they can’t attend the hike. You should always attempt to speak to the person privately, treat them with kindness and respect, explain/reiterate the gear expectations and illustrate when and how they received them.

From Chris Fogarty: “Generally, it has been my experience that they either insist that they can do the hike as they are prepared (and I have taken the risk and allowed them) or they get mad that I would actually follow my expectations regarding gear and choose to leave the trip prior to departure.

I had a trip where it was a weekend’s worth of events at the AMC Cardigan Lodge and a person who was a friend of a guest (she had not registered with me - she was a +1 of a registered participant. This person had not received the gear list from me directly) successfully climbed Mt. Cardigan in NH (~3900 ft with a complete rock ledge at summit, a ~7mile round trip) in plastic garden clogs and cotton clothing. It was successful but super stressful for me as a leader and her, given that she announced to me half way through the hike that she was afraid of heights. We were midway through the hike and there was no easy way back to the lodge so she had to complete the trip. This was a lesson to me as a newer leader of a “show and go hike” to screen and be aware of participant’s gear during the trailhead talk. A “show & go” in this case would be a hike/trip that folks sign up for and there is little to no screening.”

It is important that leaders follow the LRGs and the Code of Conduct so that they are covered by AMC’s insurance and the Volunteer Protection Act.

## Changing/Stopping Trips-in-Progress

### Question - How to Stop a Trip in Progress

“Expand on cases an outing/activity must be cancelled when it is already 1/2 way in the trail. I understand that bad weather can be a reason, a participant is ill, but are there other reasons?”

### Answer

There is usually some event (medical, weather, or otherwise) and would preclude when a trip would need to be cancelled once it's in progress. Without going into a significant amount of detail about specific events and their outcomes - because they can be numerous and varied - the most important thing that you can do once your trip is in progress is to circulate through the group, have conversations with everyone and be situationally aware of the environment, aware of where you are on “the trail” and aware of the health of the group. If the guidelines for good risk management and trip planning & management are adhered to, most unfortunate events can be mitigated. If an injury has occurred, follow Accident Scene Management Protocol, work to get all of your participants back to their cars as safely as possible, and complete all required AMC forms.

### Question - How to Change the Trip on the Day of the Event

Changing the trip on the day of the event doesn't happen often. Sometimes weather or other unexpected environmental conditions (ex: water levels being too low, ice or rockfall at a crag, road construction on a road bike route) require a change to a trip on the day of the event. If expectations are set properly, both during screening, all pre-trip emails and at the “trailhead” many issues can be worked through. Here are two examples of how Chris Fogarty was able to change the trip at the time of departure on two actual trip occasions:

1. Example 1: A participant contacts me and tells me they want to join my beginner hike at Mt. Wachusett. The trip is listed as a slow pace, 3-5 miles max distance, frequent breaks, long extended lunch in the sun at the summit. The potential participant's hiking experience is lengthy and includes many trips that are of a fast pace, with very strenuous difficulty, and long miles in remote terrain. I explain to the participant by phone (because now I want to talk to the person about this - they initially emailed me) and let them know that while I think it's great that they want to come along, I'm concerned that given their experience that this trip wouldn't be a good fit for their experience level and that we would be going really, really slow... I ask the participant if they would really be ok going very, very slow. I have already searched and found 1-2 trips that I think would be a better fit for them. They waffle a bit and I offer the other trips. The person thanks me and says they will check out the other trips.

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2. Example 2: Using the same trip from above and with the same kind/style participant and having the same info "in my pocket" about other trips, I got through the same scenario. The person indicates that they are ok with going slow. In my mind, I have reservations about them being satisfied with the trip but are willing to take them on the trip. The trip goes off, the person enjoys the relaxed pace and everything is fine.

### Question - Delaying/Changing an Outing

"On page 63 of the Outdoor Leadership Handbook it states - "Except for meeting place and time, a leader may change an activity as conditions warrant." - How does preventing a Leader from delaying a trip (for instance to wait until thunderstorms pass before starting); or changing a meeting location (for instance to shift from an above treeline route to a below treeline route in bad weather) decrease risk?"

### Answer

Preventing a leader from delaying the trip doesn't decrease risk if the trip proceeds. The trip would need to be cancelled prior to departure. This would usually be the case if the trip can't be altered. From Chris Fogarty: I do have an example of how a trip that wasn't delayed and changing locations DID reduce the risk. This is an actual example from a backpack trip I led in the whites. The trip was a 4 day presidential traverse with 3 nights of hut stays. I had already indicated to participants in an email prior to the departure of the trip that said that T-storms are anticipated and we would likely have to change our route if the storms come our way. The weather report got worse the day before the trip. My co-leader and I planned an alternate trip and spoke with AMC reservations about options should the weather decline. The trip went off ok, but the weather for day 2 of 4 was not looking good: T-storms, 50-70mph winds with gusts to 80mph. We spent the first night at the Mizpah hut. The weather was extremely bad for the next day, but ok on the 3rd day. When we had the weather report for day 2 in hand, we explained to the participants that we weren't comfortable with the level of risk for day 2's hike. We offered an alternative once we were able to hike down to reach the cars. One participant decided to leave the trip (we followed the trip removal protocol as detailed above and they left on their own). The others decided to come along for the revised adventure. We opted for low land day-hiking in a safer environment, and switched our lodging from huts to the Joe Dodge Lodge. This reduced the risk to the participants and still offered a memorable outing.

Without altering the trip, the trip would otherwise be cancelled.

Here's another example: I had a trip planned for Wachusett during January of a particular year. That year the weather called for light snow with little accumulation at the mountain with snow tapering off mid morning. As I was on the way to the trailhead, I noticed that the snow had increased substantially on the roads and in the forest. I waited for the rest of the group to arrive. A few

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participants cancelled as I was sitting at the trailhead. The snow was deeper than anticipated on the trail and the weather report now said 6” of snow by late afternoon. I discussed the intended route with my co-leader. As a way to minimize the risk, we decided to take a less steep route around the mountain to allow folks to have a good snowshoe experience but we decided not to summit. We shortened the duration of the event, provided an opportunity to snowshoe with less risk while on the trip.



## Questions specifically about the EECs

### Question - Sharing EEC Guidelines with Participants

“Regarding essential eligibility criteria for participants, the descriptions or requirements extend well beyond what is noted in a waiver- in what circumstances are these shared with prospective or actual outing participants?”

### Answer

By the nature of you providing a trip description and screening, as a leader, you are setting the essential eligibility criteria (EEC) for the trip. As participants are “screened on” the trip, it is understood that they have met the EEC for the trip. No other sharing of EEC materials/documents needs to occur with participants.

### Question - Essential Eligibility Criteria and Participant Screening

“Regarding the EEC, I know that the leaders must screen potential participants, but is it finally up to the participant to decide if they meet the criteria for the activity? If so, would the leader have to state specifically what the criteria is either in conversation or in the activity listing? i.e. how will the participant know what the EEC for their activity is?”

### Answer

Ultimately it is up to the leader to decide, but it is possible that even if the participant has qualified, they can (prior to departure) “self-select” out of the activity for whatever reason. This is why we screen participants.

The first part of this process is doing your research so that you can write a good trip description. A good trip description will help people decide if this outing is for them. This is called “passive screening”. The trick with a trip description is that you find a balance in enabling people to “self select” and making the outing sound so difficult that it scares everyone off. Using the words from the activity ratings system to make your description clear. Here’s a link to the guide:

<https://www.outdoors.org/outdoor-activities/difficulty-ratings>

The second part of screening is called “active screening”, where you get on the phone (or follow up with additional emails) with the person and find out how experienced they are. If they have any medical issues, etc...

## The Activity Database

### Question - Posting an Outing

“Is there a requirement or general rule about how far in advance an activity should be posted?”

### Answer

There is no maximum, but you should try to post the activity a minimum of 1 week in advance so that the approvers have time to approve it and folks have an opportunity to search it and inquire.

Paddling trips that are dependent on water levels are sometimes posted the day before but the approvers are alerted so that they can be approved quickly.

### Questions - What About “Emergency Activities”

“I would like a clearer explanation about an emergency non-publicized event that would not need approval before first putting the event in the database.”

“What events would fall within the guidelines of an emergency activity that would change the guidelines into an urgent situation making an immediate posting necessary without advanced approval.”

### Answer

All outings MUST be approved in ActDB although certain outings do not need approval prior to ‘advertising’ and/or signing people up.

This is an extremely narrow category of trips, reserved for situations like emergency trail work after a major storm or natural disaster or trips where emergency access to facilities is needed and a trip must run before a chapter trip approver is able to click approve and the trip goes live on the AMC online activities database. An example would be trail work to clear a logging road leading to an AMC facility in remote Maine after a major hurricane occurred. Significant tree fall across the road has blocked miles of logging road. Caretakers need to access the camp and need help from the volunteer community in order to create a work party to remove the trees.

White water paddle outings also would qualify after a significant rainfall when there is a limited time to take advantage of high water levels.

### **Question - Activity Database (ActDB) Training**

“Is there training I can take for ActDB on how to access details of qualified leaders for my Chapter? I am Treasurer and on ExComm, not an activity leader”

### **Answer**

Chapter and Committee Leadership decide who has access to Leader information. In general, Treasurers do not need access to Leader status or other details. If they need a report with Leader information, they can ask a volunteer who has Leader Manager Rights. There are many training resources for Activities Database at

<https://www.outdoors.org/volunteer/volunteer-resources/activity-database-information>.

## Paddling Specific Questions

### Question - Understanding Wet and Dry Exits for Paddlers

“I would like more explanation on: A paddler's requirement to: 5.4 Enter and exit a wet or dry watercraft.”

*(page 74 of the 2020 Outdoor Leadership Handbook)*

### Answer

This EEC is for outings where a watercraft has a spray skirt/deck that constrains the ease of exiting should the craft overturn.



Example of a canoe with a spray deck.

### Question - PFDs (Personal Floatation Devices)

“Why would AMC not want PFDs on during flat water paddling--if you get hit in the head, it doesn't matter how good a swimmer you are...”

### Answer

There are a few times, when PFDs are not needed or recommended (i.e testing out boats in a swimming beach on a hot day, ‘surfing’ when you want to dive under the board).

Currently most Club Units and/or flat water leaders have been requiring that PFDs be worn, with a few exceptions, and that state laws must always be followed. Most states require that youth (under 13, age varies) and everyone between Sept 15 - May 15 must wear PFDs.

The Interchapter Paddling Committee (IPC) feels that the LRGs make it clear, in writing, that the Club Units or leaders can have requirements that are above and beyond the guidelines. This provides support for Club Units and/or flat water leaders who choose to require PFDs be worn on their trips.

## Mentoring and Co-leading

### Question - What are Mentor Leaders?

"I'd like to know more about mentor leaders"

### Answer

A mentor leader would be a person whom you would be paired up with to complete your co-leads with. Please contact the chapter you are affiliated with to get more info.

### Question - Responsibilities of a Co-leader

"To become a leader you need to co lead a few trips. What is the responsibility of a co leader."

"I need more explanation on the qualifications of an assistant leader. I think we select them based on screening (a person who demonstrates leadership skills etc..) or do they need to be a trained AMC leader? What is the difference between the Asst leader and others who are assigned to sweep, etc.. Need clarification when an assistant leader is needed. Do we need two trained AMC leaders on all our trips or just on the first one we do?"

### Answer

The co-leaders responsibility can be anything that the leader and co-leader decide together. It is advisable that leaders and co-leaders determine their responsibilities regarding trip planning, management, first aid and other items prior to the departure of the trip.

The amount of leadership training that assistant leaders or co-leaders are required to have are dictated at the chapter level. The LRG's state that anyone can be designated as a co-leader or assistant leader. Any person can be assigned to sweep, it doesn't always have to be a leader or co-leader.

From Chris Fogarty: "I highly recommend a co-leader for all outings. I'm not entirely sure what you mean by having "two trained AMC leaders on all our trips or just the first one we do". Each chapter has their own requirements for co-leads. In all chapters, the leader-in-training will go on some number co-leads with an experienced leader. Once the leader in training has completed their co-leads, they can lead any outing within their skillset without having a mentoring leader as their co-leader."

## General Questions

### Question(s) - Pre-Trip Talks

“Which parts of the recommended Trailhead Talk are most essential?”

“Is it appropriate to have a risk management review at the trailhead prior to departure even though there has been discussion during screening for the trip?”

### Answer

It is always good practice to review with participants and your co-leaders any known risks/hazards as well as any that potential could come up. You can incorporate this as part of your trip talk.

You should tailor your ‘trip talk’ to the outing you're leading. At minimum you should always ask if anyone has not signed the waiver. Review any known risks for the outing, even if they are obvious. Review expedition behavior (setting expectations for the group). Review that participants have any required gear. Ask if anyone’s medical condition changed since the screening. Remind participants to bring inhalers, epipens and medication if needed. Review where in a participant's gear those items are located if needed in an emergency.

As a note: AMC recognizes that outings are not just about hiking. Therefore it has been requested that we try and use the term “Trip Talk” and not ‘trailhead talk’.

### Question - Using Electronics for Capturing Release Agreement Information

“Does AMC have an app (or intend to create and issue one) which would enable electronic collection and submission of VRA information?”

### Answer

Currently, our insurance company requires signatures on paper, but there *may* be something in a year to a year and half.

Technology is great, but we never recommend relying on it out in the field. The suggestion came up as to taking a picture with your phone of the VRA... While convenient, what if you as the leader is the one to get injured? Having your own emergency contact information on a locked phone is as good as not taking it with you in the first place.

### Question - Land Navigation Skills

“Is it an assumption that leaders are familiar with map reading/topography skills?”

### Answer

As a leader or trip participant, never assume that anyone you go into the woods with is familiar with map reading/topographic skills - unless I know them or their background personally. I have polled the group to see who has skills. The answers usually turn out to be a great opportunity for some quick training during a lunch stop and then reinforcement of skills during the trip. It enhances the fun a lot!

### Question - AMC's Policy Information for Participants

“Is the Trip Policy Information for Participants document readily available to the general public or is it just included as reference for Leaders?”

### Answer

The Trip Policy (Information for Participants) is available to both public and leaders on the AMC website at: <https://www.outdoors.org/volunteer/volunteer-resources/trip-policy> You can copy and paste the link on your screening form if you wish.

### Question - Working With Other Organizations “Co-Sponsored Event”

“How does coverage work when other organizations are participating in event”

### Answer

If members of another organization are participating in an AMC event, they are treated as individuals and must go through the processes we have in place for all individuals, such as being screened on a trip and filling out a liability waiver. Coverage does not change.

If the AMC is co-sponsoring the event with another organization, there are additional items in the Leadership Requirements & Guidelines that must be followed for a volunteer leader to still be operating the event under the good auspices of the AMC, and receive the standard coverage in case something were to happen:

Club Units sponsoring Activities involving outside organizations shall ensure that the jointly sponsored activity meets the standards of the sponsoring Club Unit and has an approved AMC Leader.

AND

When co-sponsoring an activity with an outside organization, it is the responsibility of the Leader to identify the responsibilities and services provided by each organization (emergency response,

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participant screening, etc.). Participants should be made aware of the nature of the co-sponsored arrangement and the specific responsibilities as well (this information should be included in the trip listing or a pre-trip briefing).

AND

Activities sponsored and conducted by any unit of the Appalachian Mountain Club shall be in support of and consistent with the traditions, principles, and mission of the Club.

Activities must be approved by persons designated for that purpose by the sponsoring Club Unit.

An approved Activity must be announced or publicized to the public through the Activities Database (ActDB) and its established approval processes (with the exception of the two circumstances noted below). This is the primary method of posting an approved trip.

### **Question - AMC Camps and Participant Gear Requirement**

“In the case of working from an AMC camp, how can we notify participants of necessary gear requirements, since we don't prescreen during application, and people show up with whatever they have?”

### **Answer**

In this case the "prescreen" would happen after participants had arrived at camp. If there was an Activity with specific equipment requirements these would need to be communicated in advance of the departure. The screen would occur when the Leader checked in with participants before departing to ensure they have the necessary gear.



### Question - Lumbar Packs

“What’s a lumbar pack?”

*(page 73 of the 2020 Outdoor Leadership Handbook)*

### Answer

A pack that goes around the waist. It generally does not have the same volume as a regular backpack.



### Question - Pack weight recommendation

“Recommended Pack or Bag weight for participants?”

### Answer

Try to keep things as light as possible. General Guidelines are that you should carry no more than 1/3 of your body weight. Less is even better and makes the experience much more enjoyable, but never compromise on carrying the 10 Essentials, plus whatever activity specific gear the participant will need for the individual trip, and any additional required gear for the participants medical requirements, their comfort and convenience.

### Question - Leader Qualification Expiration

“Once a leader is qualified how long does that qualification last?”

### Answer

This is chapter dependent. You should consult your local chapter for this information.

### Question - Recommended Supplemental Training

“Beyond Wilderness First Aid, are there any other required or recommended training for leaders?”

### Answer

This really depends on the activities you want to lead and the complexity of the outings. Some examples would be:

- AMC’s Mountain Leadership School (MLS)
- Map and Compass
- American Canoe Association (ACA) courses for paddling
- American Mountain Guides Association (AMGA) courses for climbing
- Chapter based hiking and backpacking workshops. Winter hiking.

### Question - Is CPR Recommended

“How important is it to have CPR or Life skills training to be a leader?”

### Answer

Unsure what you mean by “life skills training”, other than it can be interpreted to mean first aid training. From Chris Fogarty: “I have found it very valuable as a leader and I use the skills more at home and at work than on a trip.”

### Question - Email lists and Electronic 'Bulletin Board' Systems

Provide more info on - “The posting of Activities by individuals to read and write public accessible newsgroups or bulletin board systems or the sending of messages to an email list by persons not appointed to do so by a Club Unit are not acceptable.”

*(page 54 of the 2020 Outdoor Leadership Handbook)*

### Answer

A long time ago, prior to the AMC online activities database, email list serves, mailing lists, and digital bulletin board systems were set up by chapters to communicate activities and these were considered official trip postings (not they are not). What was happening was that participants or outside people that were on the list-serve were trying to organize activities without proper leadership credentials and experience, so the AMC needed to gain control of it and this is how they did it.

### Question - Equipment Failures during the Outing

“What do you do if a participant’s required equipment breaks in the middle of the activity?”

#### Answer

It depends on whether that item can be fixed. It isn’t the leader’s responsibility to purchase a new piece of equipment for the participant.

### Question - Finding Club Unit Policies

“I see that Club Units must have many policies and procedures in place (e.g., roster of leaders, policies for collecting money). Where can I find them?”

#### Answer

Typically these are posted on the chapter’s website, but if not, check with the Leadership Chair for your particular chapter.

### Question - Understanding Child Abuse Reporting

“Clarify Mandated Reporting of Child Abuse. If a leader is a teacher...yes, but if not, it is recommended to report but not required?”

#### Answer

Each state has its own legal definition of child abuse. The U.S. Congress has defined child abuse as “any recent act or failure to act on the part of a parent or caretaker, which results in death, serious physical or emotional harm, sexual abuse, or exploitation, or an act or failure to act which presents an imminent risk of serious harm.” This definition encompasses physical, sexual, and emotional mistreatment as well as child neglect.

Under tort law with a “duty of care”, AMC leaders in **Maine and Pennsylvania are considered mandatory reporters.**

AMC leaders in all other jurisdictions are covered by “Reporting by Other Persons” laws. Which means that any person having reasonable cause to believe that a child has been subjected to child abuse, including sexual abuse, or acts of child abuse shall report.

As reminder, reporting would be to the child’s home state, which is not necessarily the state the outing was in.

### **Question - Extending Leadership Capability Toward Difficult Trips**

“There are times when we all have to push ourselves a bit beyond our comfort zone - that is one reason why we partake in these activities so we grow in our chosen activity and learn what we can do. As a leader, it can be difficult to know when a person is beyond the point where he/she should be to keep safe and complete the task at hand. Any guidelines that you can share from your experiences?”

### **Answer**

As a leader, if you want to try something new, you would consult others who have done what you are thinking about doing. You would participate in (as a participant so you can learn) a less risky version of the activity in order to gain experience and then plan your trip. You should ask other, more experienced leaders to come along with you to provide technical assistance. In this case, the experienced leader would be a mentor to you, as well as a participant in the trip and could provide you with feedback on how you did in running that kind of difficult trip.

Constant communication with participants is the key to success. Respecting others' abilities and never pressuring others to do things that are uncomfortable is paramount. Also, establishing a safe environment can really do wonders for those who are nervous about extending their ability beyond the comfort zone.

### **Question - Club Unit Formations and Hierarchy**

“How are Club Units formed? Do Volunteer Leaders answer to a Club Unit representative?”

### **Answer**

Volunteer Club Units must fit into the organizational structure. The rules for forming them depend on where they fit. For example, the recent formation of the Interchapter Climbing Committee took place according to the processes of the Conservation Programs Committee. The process for forming and dissolving chapters is outlined in the operating rules. Volunteer Club units must define purpose, goals, and guidelines for how they will function.

Most Volunteer Leaders do work under the oversight of a VCU representative. For example, a paddling leader will follow the leadership of the Paddling Chair and the Chapter Executive Committee within which the paddling committee functions. The Paddling Chair may be the person who has responsibility for deciding who has met the requirements to be a Paddling Leader, while the Chapter Executive Committee defines how a leader manages finances for a trip for example. Chapter Executive Committees can form and dissolve activity committees.

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Some volunteers within AMC do their work with direct oversight from AMC staff rather than a volunteer leader. Information Volunteers and Alpine Stewards are examples.

All volunteers fit under the overarching governance of the Board of Directors.