



Appalachian Mountain Club

Outdoor Leadership Development Committee
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Leadership Requirements and Guidelines

The Outdoor Leadership Development Committee (OLDC) is a Club-wide committee composed of AMC volunteers and staff representing a variety of Club units. The OLDC was formed with the task of developing, publishing, monitoring, and modifying requirements and guidelines for the volunteer leaders of the AMC and the groups that recruit, train, and sponsor those leaders. The overarching goal of the OLDC in creating and maintaining these requirements and guidelines is to further the enjoyment of our members and the public through ensuring that safety and quality are priorities on all AMC volunteer led activities.

This document will be formally reviewed by the OLDC beginning two years after the most recent effective date and changes will be made as necessary. The OLDC welcomes questions, comments, and feedback regarding this document at <leadership@outdoors.org>.

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Introduction

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

- **Requirements** are the minimum standards that must be met by all Club units and leaders. Club Units may impose additional requirements appropriate to their activities, but may not waive any requirement in this document without the permission of the OLDC. Failure of any individual to meet these requirements may result in loss of coverage by the AMC's general liability insurance policy.
- **Guidelines** are further standards that should be met by all Club units and leaders. There are some instances in which it may not be possible or in the best interest of activity participants for a leader to meet these standards because of the nature of the activity or situations arising while the activity is in progress. Excluding those instances, leaders should meet these guidelines at all times in order to maintain high standards of quality activity leadership.
- A **Club unit** is any official volunteer committee of the AMC. This includes each chapter (e.g. Berkshire, Boston, Connecticut), committees within the chapters (e.g. Delaware Valley Backpacking Committee, Maine Conservation Committee, Mohawk Hudson Trails Committee), club-wide committees (e.g. Major Excursions, Interchapter Excursions, Interchapter Paddling Committee), and Volunteer Managed Facilities committees (e.g. August Camp Committee, Fire Island Committee, Noble View Committee).
- A **leader** is any person authorized by an AMC Club unit to lead or assist in the leadership of an AMC activity.
- An **activity** is any outing, trip, event, etc. sponsored by a Club unit. For an activity to be an official AMC activity, it must exist according to the qualifications set forth in this document. For the purposes of this document, social events, basic services and meals (i.e. potluck dinners, picnics, barbecues, cocktail hours, slide shows, speaker presentations, facility stays, equipment rental) are NOT considered activities and do NOT necessarily need to meet the requirements and guidelines listed here.
- The **Outdoor Leadership Development Committee** (OLDC) is a group chartered by AMC's Board of Directors to ensure that AMC volunteer led activities be conducted in the safest manner and be of the highest quality possible for the enjoyment of our members and the public. Requests for changes or amendments to this document should be submitted to the OLDC at <leadership@outdoors.org>.

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.

Liability Insurance Coverage

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

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

Requirements for Club Units

These requirements are the minimum standards that must be met by all Club units. Club Units may impose additional requirements appropriate to their activities, but may not waive any requirement in this document without the permission of the OLDC. A Club unit is any official volunteer committee of the AMC. This includes each chapter, committees within the chapters, club-wide committees and Volunteer Managed Facilities committees.

Approval of Activities

- Club units must designate one or more persons for the purpose of approving activities sponsored by that Club unit.
- Club units sponsoring activities with outside organizations must receive approval from the Leadership and Risk Management Department prior to posting activities. The proposed activity listing should be sent to leadership@outdoors.org.
- Club units sponsoring activities involving outside organizations must ensure that the jointly sponsored activity meets the standards of the sponsoring Club unit and has an approved AMC leader as either the leader or co-leader.
- Club units must ensure that the activities they sponsor are led by one or more individuals approved as leaders for that activity.
- If a Club unit sponsors activities that require leaders to collect money from participants, that Club unit must have a clear policy governing activity finances. This policy may or may not include reimbursing leaders for trip expenses and/or providing for free trips for leaders. This policy may NOT include any compensation for leaders BEYOND direct reimbursement for trip expenses and/or a free trip. Club units are also authorized to charge service fees to activity participants to reimburse the Club unit for the costs of providing activities. As necessary, these services may include expenses such as advertising, printing, postage, training, equipment provided, etc.
- Club units may sponsor the following activities:

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

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

- Club units may not sponsor the following activities:

SCUBA diving, sailing (boats over 26 feet), bungee jumping, flying of any kind including skydiving, hang gliding, parasailing, and parapenting
- Chapters, activity, camp and facility committees are authorized to approve activities within the fields of expertise of their approved AMC member-leaders, as long as the activity does not require travel to a location greater than 500 miles from any Chapter's jurisdiction, or exceed 10 days in duration. Activities in excess of 500 miles from the AMC region or longer than 10 days shall be classified as Major Excursions and must be approved by the Major Excursions Committee.

Leadership

- A Club unit will establish leadership qualification criteria for activities it sponsors. These criteria must include one or both of the following: (a) successful completion of leadership training as determined by the trainers or instructors; (b) demonstration of leadership skills developed inside or outside the AMC (e.g. previous leadership experience, co-leads with experienced leaders, etc.). The sponsoring Club unit may require additional criteria.
- The sponsoring Club unit must ensure that all leaders possess the requisite technical skills for the activity that it approves through the Club unit's established leadership qualification criteria or by additional means.
- According to its established criteria, a sponsoring Club unit will grant, change, or rescind leadership status for those persons leading activities that fall within the purview of that Club unit.

- At its discretion, a sponsoring Club unit may rescind the leadership status of an individual in response to safety and/or quality problems on activities. Once an individual's leadership status has been rescinded in this manner, the Club unit must immediately report this information to the leader and to the OLDC via the Leadership and Risk Management Department at 5 Joy St., Boston, MA 02108 or leadership@outdoors.org.
- A sponsoring Club unit must maintain a roster of its qualified leaders including name, address, membership number, expiration date, phone number, and email address (if available). This roster must be provided at least once per year to the OLDC via the Leadership and Risk Management Department at 5 Joy St., Boston, MA 02108 or leadership@outdoors.org.

Communication

- Announcements of activities that are to appear in AMC publications must be screened to determine that they meet these requirements and may only be submitted to AMC publications by persons designated for that purpose by the sponsoring Club unit.
- In the event of a reportable accident or incident (described below in **Requirements for Leaders**), the activity leader(s), sponsoring activity committee chair(s), chapter chair, and regional director shall cooperate with the Leadership and Risk Management Department in providing background information and reports regarding such event as may be requested by the Club's legal counsel or the Leadership and Risk Management Department. Those directly involved with the event should refer inquiries to the Leadership and Risk Management Department for an official statement by the Club and should avoid giving statements to the press or making public statements.

Guidelines for Club Units

One of the major responsibilities of Club units is to develop new leaders and enhance the skills of existing leaders by offering opportunities for leadership and wilderness first aid training.

Recommended Elements of Leadership Training:

- Activity planning and management
- Screening of potential participants for an activity
- Leadership responsibilities including risk management and leadership styles
- People skills including group dynamics, communication and team building
- Dealing with emergencies
- Appropriate first aid training
- AMC leadership philosophy regarding environment and conservation
- Leadership Requirements and Guidelines

Requirements for Leaders

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

Basic Requirements

- Leaders must be eighteen (18) years of age or older.
- Leaders must maintain current AMC membership.
- When leading an activity that requires collection of money from participants, leaders must follow the financial policy of the sponsoring Club unit.
- Leaders must ensure that their activity meets the **Requirement for Activities** as described below.
- Leaders must know and follow all of the leadership requirements of the Club unit that sponsors their activity.
- Leaders must make a reasonable, good faith effort to secure all permits and adhere to all laws and regulations.
- Leaders must remain in good standing. Any leader whose leadership status has been rescinded by any Club unit for safety and/or quality problems must be reviewed by OLDC prior to reinstatement as a leader in the same or any other AMC unit.
- Leaders must provide their sponsoring Club unit with their address, phone number and email (if available).
- Additional mandatory requirements for leaders of activities specifically intended for minors are under development. Leaders must contact the Volunteer Relations Department (617-523-0636) for current requirements before planning and leading an activity for minors.

Participants and Activity Management

- Leaders may not exclude persons from an activity on the basis of race, religion, color, national and ethnic origin, gender, sexual preference, marital status, age (except minors), or physical disability that can be reasonably accommodated on the proposed activity. Accommodations for participants with disabilities may be made to the level that they do not increase risk to the group. See *Guidelines for Leaders* for information on screening participants.
- When a participant is subject to leadership by an approved AMC leader acting as an AMC leader, the participant will be required to sign an approved AMC release.
- Notify all participants that there is an element of risk in the activity through the use of one of the following release documents in their approved formats:
 - 1) Acknowledgement of Risks, Assumption of Risks, and Release Agreement for AMC Volunteer-Led Activities
 - 2) AMC Volunteer-Led Major Excursions Acknowledgement and Assumption of Risks & Release and Indemnity Agreement
 - 3) AMC Volunteer Managed Facilities Acknowledgement and Assumption of Risks & Release and Indemnity Agreement.
- Keep track of the number of participants in the group and account for all participants at the conclusion of the activity.
- If, in the course of any activity, an accident or incident occurs that meets any of the following criteria, the leader must file a report of the incident as soon as possible with the sponsoring Club unit and with the Leadership and Risk Management Department (603-278-4453 ext. 2010).
 - 1) Incident response involves the use of outside agencies (police, hospital, emergency response, search and rescue, etc.)
 - 2) Participant involved in incident receives professional medical care (to the knowledge of the leader), is recommended professional medical care by the leader, or refuses the offer or recommendation of professional medical care

In addition, a leader may file an incident report under other circumstances at his or her discretion. A leader should consider the emotional and physical welfare of any participants involved in the incident, their attitudes towards the incident, and any potential for future complaints or lawsuits.

3) In cases involving potentially life threatening or disabling injuries or in the case of a fatality, the Leadership and Risk Management Department or other staff at AMC headquarters (603-662-5651 or 617-523-0636) should be contacted as soon as the situation reasonably permits. For more information on contacting AMC staff in the event of an emergency, please refer to the crisis communication chart at www.outdoors.org/pdf/upload/crisis_communication_chart.pdf

- Additional mandatory requirements for leaders of activities specifically intended for minors have been developed. Leaders must contact the Volunteer Relations Department (617-523-0636) for current requirements before planning and leading an activity for minors.

Equipment

- Leaders must check to ensure that all participants are equipped with activity-appropriate safety equipment and that it is used at all appropriate times.
 - 1) On all rock climbing, ice climbing, bicycling and in-line skating activities, helmets appropriate to the activity must be worn during participation by all leaders and participants.
 - 2) A paddling activity leader may require helmets on any activity. Helmets must be worn by leaders and participants while open boating on Class III or higher rapids, while closed boating on Class II or higher rapids, and while rafting in all rapids.
 - 3) Personal floatation devices (PFDs) must be worn at all times when paddling activity leaders or participants are on the water with the exception of flatwater boating activities. On flatwater boating activities, PFDs must be present for all leaders and participants in their boats at all times.
- Leaders must refuse participation to individuals not equipped with the safety equipment listed above or any other equipment deemed necessary for the safe participation in the activity by either the leader or the sponsoring Club unit.
- Leaders must ensure that appropriate safety and first aid equipment is available during their activity.

Accident Scene Management

- In case of accident or injury, the leader or his or her designee should decide a course of action. Recommended steps include:
 - 1) Ensure the scene is safe for all uninjured parties.
 - 2) Stabilize the situation and contain the extent of injury or damage.
 - 3) Attend to the well being of injured or ill persons, documenting care whenever possible.
 - 4) Assess emergency needs and develop a plan.
 - 5) Implement plan, reassessing as necessary.
 - 6) If an injured person needs professional assistance, use available communications technology or designate a group to go for help. Make sure the group carries appropriate safety equipment and written details on the location, situation, and plan of the group remaining with the injured person.

Guidelines for Leaders

These guidelines are further standards that should be met by all leaders. There are some instances in which it may not be possible or in the best interest of activity participants for a leader to meet these standards because of the nature of the activity or situations arising while the activity is in progress. Excluding those instances, leaders should meet these guidelines at all times in order to maintain high standards of quality activity leadership.

Consider the safety of the participants to be more important than the goal or the completion of the activity and always be prepared to cancel the activity, change plans or turn back upon the recognition of unreasonable or unacceptable risks.

Training and Preparedness

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

Communication

- In describing an activity and its relative difficulty, writing an activity announcement, providing information to participants subsequent to the announcement, describing the meeting place and time, and detailing cancellation procedures, leaders should strive to be accurate, complete, concise, and clear.
- Leaders should communicate the activity plan, guidelines, and safety procedures to the participants before the activity begins and keep participants informed of any changes in plan. Leaders will expect and encourage participants to inform the leader of any changes in their ability or willingness to continue with the activity.

Participants and Group Management

- Applicants/participants may be excluded due to inadequate qualifications or experience, insufficient skill, inadequate equipment, capacity limitations, previously demonstrated personal incompatibility, unsafe actions, refusal to share community work, or inappropriate behavior. Minors (under age 18) may be excluded for any of the above reasons and/or unless they are accompanied by a responsible adult. See *Requirements for Leaders* for the AMC's non-discrimination policy.

Screening participants can be a challenging and complex undertaking. If you have difficulties or questions regarding this issue, or an individual participant, feel free to contact the chair of your sponsoring activity committee, your chapter chair or regional director, or the staff or Leadership and Risk Management Department (603-278-4453 ext. 2010).

- During the activity, leaders should attempt to facilitate positive group interactions and to make sure that new people are introduced and integrated into the group.
- Leaders should expect and encourage participant conduct consistent with Leave No Trace environmental and conservation principles and local regulations.
- Leaders should not require anyone to attempt any element of the activity that is beyond his or her ability.
- Leaders should discourage anyone from ridiculing or otherwise embarrassing another person who chooses not to attempt any element of the activity that they feel is unsafe, dangerous, hazardous, or beyond their current abilities.

Activity Management

- If the leader is unable to participate, a qualified replacement leader should be found according to the policy of the sponsoring Club unit. If a qualified replacement leader cannot be found, the activity must be canceled and participants notified.
- Carry appropriate information resources, such as guidebooks, maps, etc. as applicable in the event that the activity plan must be modified.
- Designate sufficient assistant leaders, for duties such as lead, sweep, sub-group leader, or others, to ensure that the activity is run safely.
- Designate only persons as assistant leaders who have the skills required for the tasks assigned.
- Set and maintain a pace appropriate for the group and consistent with the description of the activity. Slow the pace if the current pace is compromising group management. In the interest of safety, try to keep the group together. With respect to bicycle trips on public roadways or other common ways, leaders may establish or encourage spacing of small groups along the roadway to facilitate "leapfrogging" by passing vehicles in compliance with laws and regulations.

- There may be times when it is advisable to divide large groups into smaller, independent sub-groups. Factors that should be considered include: regulations or suggestions regarding group size; type of activity and size of group that the leader team can manage safely and effectively; impact on the environment; and impact on other persons' outdoor experience. If the leader divides the group into sub-groups, s/he should assign qualified assistant leaders. With respect to bicycle trips on public roadways or other common ways, due to participants' varying levels of expertise and ability and their personal riding preferences, sub-groups form and dissolve during the course of the trip. So long as these groups remain between the point leader and the sweep leader, no qualified assistant leaders need be assigned to each sub-group.

Requirements for Activities

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

- Activities sponsored and conducted by any unit of the Appalachian Mountain Club shall be in support of and consistent with the traditions, principles, and mission of the Club.
 - Activities must be approved by persons designated for that purpose by the sponsoring Club unit.
 - Any activity authorized by an activity sponsoring Club unit may be classified as an Interchapter Excursion at the discretion of the leader(s) and the sponsoring Club unit, and with the concurrence of the Interchapter Excursions Committee, or the Interchapter Paddling Committee for canoe and kayak activities. The approving Interchapter Committee may impose requirements on the activity in addition to the requirements of the sponsoring Club unit.
 - An approved activity must be **announced or publicized** to the membership through an official AMC channel of announcement and/or publication (except under the two circumstances described below). The following methods are suitable:
 - 1) **AMC Outdoors** – The member magazine is the most common method of activity announcement and current rules for listing set by the publication apply.
 - 2) **www.outdoors.org** – The Club's online trip listing database can be used for activity announcement through its established approval processes.
 - 3) **Sponsoring Club Unit Publications** – Schedules, newsletters, etc. are also a common method of announcement and current rules for listing set by each publication apply.
 - 4) **Postings** – Camps and Club facilities generally post a list at the beginning of each week, or other time period, of their approved activities scheduled for that period.
 - 5) **Phone Line/Voice Mail** – A telephone answering machine, voice mail service or "hotline" maintained by the sponsoring Club unit may be used to verbally announce information regarding approved activities. **
 - 6) **Computer Systems** – Electronic announcements (such as web site listings or e-mail listserves) are acceptable as long as they are presented as read-only files through a system maintained by the sponsoring Club unit. The posting of activities by individuals to read and write public accessible newsgroups or bulletin board systems or the sending of messages to an e-mail list by persons not appointed to do so by a Club unit are not acceptable methods of announcement and do not constitute approval of the activities as AMC activities. **
 - Certain activities are intended to serve a limited group of AMC members (e.g. a hike for urban youths or a canoe activity for persons with disabilities requiring physical accommodations). These types of activities may not be suitable for publication to the full membership or the public but are publicized in more targeted ways. These activities must receive prior written approval from the sponsoring Club unit. **
 - Certain activities are approved by sponsoring Club units but cannot be advertised by any of the approved methods above because of time restraints (e.g. a paddling activity dependent on the current water level or a trail maintenance day to clear blow down immediately following a major storm). **
- ** Sponsoring Club units must keep a log of all activities that they approve that they are not able to publish or post in writing. The information in this log must include the dates of the request and approval, the date of the activity, the leader, the kind and general location of the activity, as well as all other complete report forms that the sponsoring unit requires for publicized activities.