

## Rob's Advice to Prospective Climb Leaders

### **My Goal**

I want the Seattle Mountaineers to have more active climb leaders. I think the quality of the leaders we have now is excellent, and I want to keep it that way, I am not proposing lowering the bar required to become a climb leader. Instead, I want to do more to encourage people who aren't leaders yet to seek out opportunities to self-improve with the ultimate goal of becoming an excellent climb leader, both on their application and in practice.

### **Follow Your Own Style**

At the end of the Intermediate Course Guide are [a few pages](#) under the heading "The Climb Leader List." Go read that, it's a very worthwhile read about what leadership means, including teaching, judgement, and experience. It is more important than anything I say here. It also mentions staying true to yourself, and your own style of leadership, which I agree with. Your style will be and should be different from mine. So, take any bit of advice I offer here with a grain of salt: does it resonate with you? Do you want it to be part of your leadership style? I'm writing this to help you realize good ideas you might not have thought of yet to add to your own leadership style, not to outline some kind of strict formula of leadership that you must follow.

### **My Fundamental Tenets**

An overall tenet that all of *my* personal leadership philosophy falls within is that **leadership is a service**. It's something you do because you care about the people on your trip, and you want to help them.

The second most important tenet for me is **keep the group together**. I cannot emphasize enough how important it is to keep the group together, for so many, many reasons. (Rather than take up a lot of space here, I'll attempt to answer "why?" in an appendix to this document.) Of course, everything is situational, and some day you may be forced to separate a group (as long as it's truly a service to the group, and not just to an individual,) but be mindful and don't take it lightly.

It's certainly possible that you could disagree with me on either of those points yet still be a good leader, but in that case you'll probably disagree with a ton of things in this document, so we might just have to agree that I'm not the best source of leadership advice for you, and that's okay.

### **Every Climber is Already a Leader**

Every member of every climbing team has a responsibility to the people they are climbing with. That responsibility is to voice good decisions in the service of the group at any time it's

necessary to do so, whether that means you as an Intermediate student or peer point out a concern that is possible others (including the designated leader) may have missed, or you as a Basic student speak up when you first sense that you are uncomfortable with something. Speaking up allows the group to realize what's on your mind, and either assuage your concerns through a productive discussion or teaching moment, or scale back before the situation becomes more serious and becomes much harder to react to. The two takeaways I want you to get from this is: (1) if you are not yet officially designated a leader, that doesn't free you from being responsible for every suggestion made here. And, (2) I throw around the term "leader" a lot in this document, but don't get intimidated by it. The only difference between a designated leader and everyone else in the climbing party is that designation, otherwise the leader is just like you, and you are just like the leader: Human, and just trying to do the best for everyone's sake.

## **The Road to Becoming a Climb Leader**

For me, it was one year between the point in time where I consciously decided "Yes, I want to become an official Climb Leader for The Mountaineers" and the point in time where the Climbing Committee voted on and approved my application. Even before that, a couple of years of courses, climbing, and trips with friends had been helping me develop the skills necessary to do this, whether I realized it or not. There is a lot that needs to happen even before you submit your application, and it's okay to work up to that in any time frame, as long or as short as you are comfortable with. Here are the major steps of the process:

1. Before you can lead others, you need to become a complete and self-sufficient climber yourself. See the section below, and evaluate yourself. Are you the complete package? How would you feel about having someone with your exact background and credentials as a climbing partner when the going gets tough? How about as your climb leader? (Also, be aware of the [Confidence Gap phenomenon](#): is there a chance you're being under- or over-confident in your self evaluation?)
2. Do a number of Mountaineers climbs as a "mentored leader." The Climb Leader application states that the minimum you should do are two successfully summiting mentored leads. However, I would encourage you to do at least three mentored leads (where at least two of them successfully summited,) ideally with three different existing climb leaders.
3. Use this form to [submit your application to become a Climb Leader](#), which should send it to the the Leadership Subcommittee of the Seattle Climbing Committee. Once your application is received, a lot happens behind the scenes, so it'll be about two months before your application finally gets approved or rejected. The Climbing Committee doesn't meet during summer months, so an application submitted during or just before summer could have to wait up to four months. Specifically, this flow chart shows what's going on:

[https://docs.google.com/drawings/d/1nrXuauLmqfJOOHq3e\\_KlgCtxMWbehoBiQoI3gEG7Glg/edit?usp=sharing](https://docs.google.com/drawings/d/1nrXuauLmqfJOOHq3e_KlgCtxMWbehoBiQoI3gEG7Glg/edit?usp=sharing)

## The Complete Climber

The complete climber, who is ready to be a leader:

- Is in **good physical shape**. You don't always have to be the fastest or strongest in the group, but definitely cannot afford to be the "weak link."
- Has a current **Wilderness First Aid** certification, or better.
- Has taken and understands **AIARE Level 1**. Even if you never intend to enter avalanche terrain, (1) how will you know exactly what is and is not avalanche terrain? And, (2) the study of human factors in AIARE 1 is superbly useful to decision making on any trip, even those far from any snow.
- Has practiced (or better yet, helped teach) **Rescue Methods** sometime within the last year. (Those skills are the opposite of riding a bicycle; your memory of them fades much faster than you realize.)
- Has read a lot of **Accidents in North American Mountaineering**. Be respectful, but learn from other people's misfortunes and mistakes. This can condition your brain to spot the little things, the warning signs, leading up to a tragedy, so you're more likely to recognize them on your trip while there's still time to choose a less risky option.
- Obviously, has **climbed a lot** of routes! The goal here is experience, so trips count whether they were official Mountaineers climbs or not, and whether they summited or not. It's hard to say just how much experience is enough before you have enough of a base from which to draw good judgement, it'll be different for every person. But, if you can remember how many times you've been in the alpine off the top of your head, then you probably don't have enough experience yet.
- Is a good practitioner of [Leave No Trace principles](#).
- Is used to the job of "**trip organization**," coordinating logistics like the trip schedule and shared gear. Organize a few of your own trips outside of the Mountaineers by inviting a handful of friends on an outdoor adventure. Even better is if you have friends who are enthusiastic about the outdoors, but don't yet have experience at something you do, be it a simple day hike, or an overnight backpack, or going snowshoeing. You'll learn a lot from teaching them. Taking friends into the alpine for a scramble or technical climb is also a possibility, but be careful that you don't take someone someplace they're not ready to go yet. Remember how many teaching field trips you went to before going on even one Basic climb. Also, if you invite Mountaineers members, stick to people who are your peers, there could be liability concerns if you take students who view you as their teacher before you're officially a Climb Leader.
- Is comfortable **route finding off-trail** in an area they've never been before. Unfortunately, there is no class yet within the Mountaineers that explicitly teaches this skill. The Navigation course teaches you how to answer the questions "Where am I right now?" and "What's the bearing to my destination?" but it doesn't teach "Given rugged

terrain, how do I find the best way to get from Point A to Point B?" You'll naturally pick up some of this skill by going on Mountaineers climbs and scrambles, but unless you are the leader, it's rare that your ability to route-find is really proven. Test your ability by leading private climbs, scrambles, or snowshoe trips with friends where none of you have ever been before. (Hint: get as much beta ahead of time as possible. Photos other people took and then drew lines on are your best friend if you can find them. You might be able to find and bring someone else's GPS track too, Peakbagger.com is a good source, and the Gaia app for iPhone or Android will let you view it on the go. Even with all that, efficient route-finding is often not easy.)

- Has the **capability to "go first" any time** it may be necessary (e.g. kick steps at least part of time on snow, or lead the way when route finding is tricky, or lead the crux pitch if he or she was the one who chose the route.) But, that doesn't mean it's always necessary. Often it's best to delegate the job of "going first" to another party member who's capable of it, just make sure you as the leader are *capable* of stepping in and going-first at any time if need be.
- Is able to roughly **predict how another climber will perform on a certain route**, given whatever knowledge or vibe you can gather by talking to them or seeing their climbing resume. Time spent teaching, helping out with a Basic SIG or an Intermediate mentor group, will help you hone this fuzzy skill.
- Is **diplomatic**. Sooner or later you'll have to have a conversation with someone that they don't want to hear (e.g. perhaps they cannot go on to the summit, for reasons they don't yet understand.) Taking a seminar on leadership skills (sometimes the Mountaineers offers those,) or reading a book like "Outdoor Leadership" by John Graham can offer ideas on how best to have those conversations.
- Exhibits **confidence and happiness**. A leader's mood will rub off on those he or she is leading.

Notice that nowhere in that list did I say "Must lead 5.x on rock." Leadership capability has little to no correlation to climbing technique alone. More important is a leader's self-awareness of what his or her limits are, and ability to use good judgement when choosing routes to lead, keeping them within his or her ability to go first if need be (or more importantly, to bail from safely if need be.)

## Doing Mentored Leads

A mentored lead is a Mountaineers climb that you organize and lead (you are the "mentored leader,") with an existing Climb Leader coming along, but stepping back and acting in a rope-lead or participant role (referred to as "the leader of record.") This can be anywhere on the spectrum from a teaching experience to an evaluation of your readiness for leadership, so it's best if you talk to the leader of record pretty early on to let him or her know where on that spectrum you'd like the trip to fall. In any event, as the climb is planned, talk over anything and

everything about the climb with the leader of record (the weather, the roster, your concerns, the schedule, etc.) to verify you are on the same page, and learn more about what has worked for them in terms of leadership style.

To make mentored leads happen:

- Brainstorm a list of routes that you see yourself as ready to lead a group on. When I did this, I had originally sought out routes I had done before, so that I wouldn't have to worry about the route finding at the same time as worrying about monitoring & managing the group. However, be open to doing your mentored leads on routes that are totally new to you too. Sometimes the Climb Leaders you reach out to will suggest routes, and if they're Basic climbs, I'm confident you have the ability to research a route that's totally new to you and then lead a climb on it. Rise to the challenge.
- Come up with a list of dates you are available to do mentored leads on those routes. (Let me emphasize, list of dates, not just one date.) Make sure you look up each route you had in mind in "Routes & Places" on Mountaineers.org ahead of time and verify that it is not already taken on the dates you have in mind, as most routes have a limit of one Mountaineers party per day to avoid clogging.
- Brainstorm a list of existing Climb Leaders whom you know, and send them all an email asking them if they'd be willing to do a mentored climb with you. Include your list of routes and dates, but be flexible. (The more you can be flexible, and the more you can make it easy for the leader of record, the more likely it is he or she will be able to work with one of your suggested options.)
- If someone agrees to do a mentored climb with you, have them post the climb on the website, add you to the roster, and then make you and admin for the climb. After that, you can manage setting all the details, and learn more about working with the website.

Mentored leads most clearly demonstrate your readiness for leadership when:

- It's a Basic climb, with Basic students. It shows more leadership to lead a Basic climb (a larger group, with less experienced members) than an Intermediate climb (a smaller group, with members that need less leadership.)
- You, the mentored leader, do as much of the pre-trip planning as possible. Ideally you're involved in choosing the route, the date, and finding rope leads. Sometimes when you reach out to existing climb leaders asking about possibly doing a mentored lead, they try to convert a climb they've already posted and filled the roster for to be a mentored lead for you. That can still offer some good experience, but it doesn't give you the whole experience of leading climbs.
- You do mentored leads with as many different climb leaders as possible. When it comes time for your references to be checked or your Climb Leader application to be voted on, it carries a lot more weight if three different people each speak well of you after each having done one mentored lead with you, as opposed to one single person speaking well of you since you've done three mentored leads all with them.

If leading a group in the wilderness is new to you and/or you feel nervous about it, you can start small by doing some combination of the following things to make it more digestible. There's no limit to the number of mentored leads you can do, so you can always do an additional more challenging one next time.

- Choose 1-day routes. The longer the route, the more planning is required, and the more decisions you'll have to make as a leader.
- Choose routes you've done before.
- Plant a ringer. Bring someone you trust and can rely on when you are stressed. Before registration for the climb opens, invite a very competent intermediate student that you've meshed well with on previous climbs to be one of your rope leads. However, don't take this stacking the deck too far: keep more than half the roster full of people you don't really know, it'll be easier for them to look up to you, respect you as an authority figure, and take you seriously when necessary.
- Keep the group size down. It's easier to lead a group of 4 than it is a group of 8, and it's easier to lead a group of 8 than a group of 12. However, the scale isn't linear: you still have to make a lot of the same decisions no matter what the group size is, it's just easier to get those decisions right with smaller groups. (What time do we start? What's the shared gear list? etc.)

## **The Leader's Job, The Fuzzy-Theoretical description**

Your job is to anticipate, prompt, unify, monitor, pace, and educate.

### *Anticipate:*

A good climber is always mentally one step (or more) ahead of what's actually happening on the climb. If you're the leader of the group, it's even more essential that you are anticipating things, both during the pre-trip planning, and continually while on the climb itself.

- What is it going to take for the group to accomplish an upcoming goal? (Example: how much time is the group going to need to get from point A to point B? That's often a different answer than how long it might take you if you were traveling alone, and it's different for every group.)
- What equipment is necessary for safe travel in the terrain that is 5, 10, 15 minutes, or an hour ahead of us? Tell everyone to put that equipment on before it's necessary. Put on crampons and have ice axes in hand before the snow steepens. How exposed is that rock scramble ahead? Will the weakest member of the team be comfortable soloing it, or would a handline or even a top-rope belay be more appropriate?
- What are the things that could possibly go wrong, and what is the likelihood of each? (Example: What happens if unexpected precipitation happens at such-and-such a time? What's the likelihood that the "clear" weather forecast for that day could be off? Or, what happens if things get drastically behind schedule? Or, what if an injury accidentally

happens at such-and-such a time near the end of the day? What time & resources would be needed to adequately handle it?)

Unfortunately, the ability to anticipate what could go wrong mainly comes from a volume of experience with things going wrong. Gaining that experience first-hand is likely to be a cost too high to bear, and can be product of ignorance or complacency. Defend against this by instead learning from other's experiences. Read Accidents in North American Mountaineering, definitely more than one year's worth. Ask a friend who has been injured climbing (sadly, we all end up with some eventually) to share their story with you, especially the story of their recovery. Read any trip reports you can find, especially if they're narrative and go into details. Notice the small problems people encounter in addition to big ones. Understand the mental traps that all humans are subject to. Be careful not to judge, but to learn from them. You don't need to comment on them, just figure out a way you can set yourself up to do better.

*Prompt:*

Be the moderator of conversations: start conversations, frame conversations, and resolve conversations. You can start conversations by verbalizing your thoughts on something, then making it clear you're open to input by following up your "This is what I'm thinking" with "What do you guys think?" By taking a stance, you're also framing the conversation so it's more productive. (Example: Say "I'm thinking of alarms at 2am for our alpine start, what do you guys think?" instead of "When do you guys want to get up?" The second question is too general, and is likely to get unproductive, non-specific answers like "Let's get up early-ish." Or, "Looking ahead, I see such-and-such a hazard, but I think it's reasonable to go forward for now as long as we keep our eye on it, stay mindful, and are willing to turn around if it becomes worse. What do you guys think?") Collaboration is great, it really helps you monitor the group's desires and personal risk tolerances (everyone's risk tolerance is different, and no one's should be exceeded intentionally.) But, in the end it's up to you, the leader, to resolve conversations. If there isn't group consensus, or a conversation starts taking longer than it's worth, it's up to you to make and announce a judgement call that ends the conversation so the group can get back to moving.

*Unify the group:*

There's more than one right way to do a climb, but things are much more likely to go smoothly if everyone in your group is thinking of the same way. What are the kinds of decisions that any climber would have to make for the route you are targeting? For example:

- What specific version or variation of the route do you intend?
- Is there any gear-selection that could be in question? For example, what about ice axe & crampons? What about snowshoes? Avy gear? For those pieces of gear that may or may not be brought in certain conditions, it's up to you to make the call if everyone should bring them, or no one should bring them, and announce it so that everyone's unified and on the same page.
- When & where should everyone meet? Start hiking? What should the turn-around time be?

These sorts of things are judgement calls. It's likely there'll be more than one right answer, and it's likely there'll be wrong answers that aren't clear to be wrong until the light of hindsight is shed on them. This makes them tough decisions to make, but someone still has to make a best stab at making these decisions, and as the leader the buck stops with you.

*Monitor:*

Monitor how everyone's doing. Make sure you monitor yourself too. One of your biggest blind spots as a leader is that you don't know what the members of your group are capable of. Also maintain vigilance about possible problems. Every climb is continuously faced with the judgement-call of "should we keep going or should we turn back?" Most of the time things are going well and the answer is easy. However, not everyone in the group has the same experience level. Some people may not yet know how to spot some of the early warning signs of a bad situation in the making. It's your responsibility to use your experience to recognize what problems could happen before they happen, and help educate the members of your climb about them.

*Pace:*

Someone needs to keep the group on schedule by instilling a sense of urgency. Alpine climbs are always long days, and if the sense of urgency isn't maintained throughout, they become very very long days, or even overdue epics instead. Take an active role defining how often and how long the group will take breaks for. It's best if you can announce at the beginning of a break how long you'd like the break to be to unify everyone's thoughts of how much time they can expect to have. With less experienced (or even just tired) climbers, you may want to suggest some things they should get done during the break, but ultimately it is up to each individual to take care of themselves. (Example: "Okay guys, 10 minute break; eat, drink, and consider putting sunscreen on." or "Quick 3-minute break here, then we need to get moving again.")

*Educate:*

Most of the time people go on Mountaineers climbs because they are still learning. We are all still learning. The best way to educate people is to be really transparent. Talk out loud about what you are noticing about the route ahead, the weather, the time, etc, and talk out loud about how you're thinking of handling it, even before final decisions or actions are made. It will make people more understanding when you announce an otherwise-unpopular decision to turn around without summiting, and it will make people more aware of things to be mindful of on their own private climbs in the future, slightly increasing their safety even when you're not there.

## **Some Specifics of How I Implement a Climb**



Remember what I said in the beginning about following your own style. Remember I am not saying you have to do it my way. I'm simply offering what I do in case you want to make any parts of it your own. Pick and choose what you like from the lists below.

#### Posting the climb on the website

- Set things up for success by setting the right expectations about the climb. Use the "Leader's Notes" section of the activity listing on the website to describe the skills and fitness level that'll be required for participants to be comfortable on this climb. Make those concrete and measurable as much as possible. Everyone will have a different interpretation of "It will be a very hard day," so it's better to say "It's likely to be a 12+ hour day, and on the approach we'll need to gain 5000' in 5 hours with ~40lb packs." If you do this well, people who sign up will mostly self-filter, so that only the people who believe they're capable of rising to the specific challenges you've described choose to sign up.
- Optionally, you may be posting the climb to only help a certain group or audience, which is totally welcome, but it's best if you declare that explicitly on the website. I would encourage you to add a sentence saying one of the following: (And I'm totally a fan of saying any of these, it's definitely leader's choice!)
  - "Priority is given to members of John Doe's SIG until mm/dd/yyyy, after that anyone is welcome to sign up."
  - "This climb is only for students who are in need of credit towards graduation."
  - "This climb is open to anyone."
  - "This climb is only open to past graduates of Basic, no current students please."
  - Etc.
- If you choose to, you can also use a lottery system to determine who gets on a climb and who gets on the waitlist. It's best to define upfront the date when you'll make the lottery drawing, and tell people how they should get in on the lottery. Personally, I keep the climb's registration closed, have people email me, then on the lottery date I plug their names into <https://www.random.org/lists/>, then I manually add each person to the climb's roster & waitlist in the order given by random.org. Another option that doesn't involve people emailing you is described here: <https://www.mountaineers.org/about/branches-committees/seattle-branch/committees/seattle-climbing-committee/seattle-climbing-website/for-leaders-folder/lottery-sign-up-for-climbs>

#### Before the climb

- Research the route. Be able to visualize how every part of the route will go.
- Draft a schedule of how you expect the climb will go, and **write it down**, even if it's just for your own notes.
  - Mentally break the entire climb down into pieces. For each piece, estimate how long you expect that piece to take, and what the longest acceptable limit of time for that piece is in case the group moves slower than you expect (note that those are two different answers.) Find a way to break big pieces in half (e.g. instead of

just estimating “the approach” instead estimate “from trailhead to tree line” and “from tree line to rope-up point.”) That way during your climb you’ll be able to find out sooner rather than later if you’re behind schedule.

- Also, be very careful not to leave out all the little transition times! Assume 30 minutes will go by between when the cars park at the trailhead and when the group actually starts moving down the trail. Assume 30 minutes between arriving at a rope-up point and being fully ready to climb. Assume 1 hour to break camp, or more if breakfast is included in that time.
- Remember, how long a piece *should* take, and how long a piece *can afford* to take at the longest, are often two different times. Accurately estimating the second is more important for generating well-chosen turnaround times, and not becoming overdue. Put this schedule in writing, even if you choose not to send it to others. Actually writing it down forces you to really think through it rather than just hold a vague mental feeling of it, and it forces you to sanity-check your estimates before the climb. Finally, it allows you to compare them with reality after the climb, which will greatly improve your ability to estimate accurately next time.
- If it’s an overnight, answer the following questions for yourself ahead of time, so none of them catch you by surprise during the climb itself:
  - Where exactly will you camp?
  - Is the water source there likely to be simply treating water that’s flowing, or will the group have to melt snow for water?
  - How will food be stored at camp?
  - What time will alarms be set for?
  - What time do you hope to go to bed the night/afternoon before?
  - If you intend to summit, break camp, and hike out all in the same day, how long will each of those pieces take individually?
- Send an organizing email about five days before the climb starts, or earlier if you’d like. An initial organizing email has a lot of power to set things up for success. Often extra time invested in writing the organizing email will pay itself back doubly-so later. By heading off common questions with enough detail (like what to pack,) you as the leader get fewer repeated questions (like every member of the climb individually emailing you asking if they should pack this or that.) Also, a good organizing email makes the climb almost run itself when you’re actually out there. When all the participants know what you have in mind for route & schedule ahead of time, they naturally work to make it happen, greatly lessening the amount that you the leader have to work to direct them on the climb itself.

#### During the climb

- I like to set expectations that there’ll be a short break once per hour. (So, 50 to 55 minutes moving at a time, followed by a 5 minute break.) This helps keep everyone together, helps keep anyone from “bonking” because they neglected calorie-intake for

too long, and most importantly, it helps keep things on schedule because it motivates everyone to synchronize when they take their breaks. It's easier for someone to push on and wait for the group-break to take care of something they need if they know a group break is guaranteed to be less than an hour away.

- If someone asks for a break (especially a food-related break) don't wait too long before providing that break. It's okay to say "Let's get to that flat spot over this rise," but don't let more than, say, 20 minutes go by before the break happens. If someone bonks because they haven't been eating enough, it will cost you more time.
- During any discussions, explicitly separate *observations* and *conclusions*, they are separate things. Too many people state an observation, and then trail off without saying what conclusion they're drawing from it, which confuses other people because those other people think you're implying an obvious conclusion, even though the conclusion that's "obvious" to them may actually be different than the conclusion that is "obvious" to you. For example, if someone says "Those clouds are darker than I expected..." that's an observation, with too much room for confusion about what conclusion you're implying. For clarity, it's much better to explicitly state the conclusion your mind is coming to at this time, like any of the following statements: (notice how the observation is exactly the same, but the overall meaning is very different because the conclusion is explicitly stated.)
  - "Those clouds are darker than I expected. I don't think they'll be a problem for us, so I think we should keep going for now, but we should continue to monitor them."
  - "Those clouds are darker than I expected. I think we should turn back now because we cannot afford to be caught in a storm up ahead."
  - "Those clouds are darker than I expected. I don't know what to think about them yet, I haven't drawn any conclusions, but I'm curious to hear what other people are thinking."
- Similar to the above point, if someone else states an observation, don't assume what their conclusion is, instead say "Good observation. How do you think it affects us?"
- Delegate. During the approach, have one of your rope-leads take point up front and navigate. Have another act as a sweeper in the back, making sure no one gets left behind. That frees you up to be anywhere in the middle and monitor whomever you think needs it most. If the person up front navigating takes a turn you disagree with, catch up with them and discuss it. Of course, as the climb leader, you should absolutely be capable of being the person in the front navigating if necessary, but even better than being the person navigating yourself is to have given someone else all the info & tools they need to navigate for you.
- Protect your own mental energy. It's exhausting enough just being on the climb in the first place. You as the leader have to make a lot of decisions, on top of just being a good member of the trip yourself. If you stop making good decisions because you're too tired, it's going to create a bad situation for everyone. Instead, protect your own mental energy by:

- Making as many decisions as possible before the climb starts, so you're left with a smaller mental burden during the climb itself. (For example, what time should alarms be set for if it's an overnight? You'll be far less mentally drained if you decide that while you're still at home and comfortable. It's totally okay if you change your mind once on the climb due to new circumstances, and it's also easier to decide how to adjust an existing decision than it was to have made to original decision in a vacuum.)
- Delegating jobs, rather than doing them yourself, so you keep your hands free, and therefore mind free (like rebuilding a faded rap anchor, or organizing water-collection at camp)
- Carrying less than the maximum pack-weight you can carry, so you don't end up super worn out.
- Carry some sugary snacks. When I'm wiped, a bit of gummy candy helps me get mentally back in action.

## The Organizing Email

I'm a big fan of sending one big email upfront to everyone signed up for the climb that anticipates a lot of the common questions (including the people on the waitlist, so they know what's going on too in case they're called upon at the last minute to actually join the climb.) It's best to send that email out five days before the climb to give people plenty of time to prepare (even earlier won't hurt if earlier works for you.)

Consider your audience. What is their current knowledge level about climbing? What are the things they don't know, or don't have experience with yet? What kind of questions are they likely to have, given their knowledge level? Especially if it's a Basic climb, remember that it'll be a longer list of things than what you would need to know, so it's likely you'll have to explicitly state a number of things that seem obvious to you or would be obvious to a more experienced climber.

A major challenge to the organizing email is that there's an enormous amount of information to convey, but if any bit is too long to read then no one will read it anyway. The best solution is to structure the email as much as possible, breaking it into sections, where each section is small enough that it can entirely fit on the screen, with no scrolling required, and the titles of sections can be skimmed while scrolling. Also, within sections, bulleted or numbered lists earn eye-ball time more than paragraphs, so use bulleted lists instead of paragraph-form anywhere it makes sense.

Here are some section ideas for an organizing email. They're just ideas, use them as much or as little as you think your audience needs to hear:

- Weather
  - Include a specific NOAA link to the area's weather forecast:  
<http://forecast.weather.gov/MapClick.php> (Make sure it's of an elevation that reflects where you'll be, so people don't mistakenly pack expecting sea-level temperatures.)
  - Include a specific mountain-forecast.com link (or two) that best represents the area's weather forecast: <http://www.mountain-forecast.com/>
  - What time is dawn? What time is dusk? (Sure, instead of dawn/dusk, you could just look at official sunrise & sunset, but what matters more practically is when you will or won't need headlamps, which is about a half hour offset from sunrise & sunset.)
  - Will there be moonlight during the night? (i.e. what is the moon rise time, set time, moon phase, and what's your personal guess to the likelihood of cloud cover blocking it?)
  - Finally, write your own sentence to paragraph interpreting the weather forecast you're seeing via those links, and what you think it means for the planned climb. Not everyone on the climb may be able to interpret what that forecast means for climbing yet, so this is an opportunity for you to demonstrate to them your thought process. Even those who do know how to interpret a weather forecast may be interpreting it in different ways, so you explicitly writing your interpretation of it helps everyone get on the same page.
- Route Info
  - Clearly state enough information about the route you have in mind so that people know exactly what route (and even what variation of the route) you intend to lead the group up. Just as important (perhaps more so) explain which descent option (and what variation of the descent route, if any) you are planning to use. It gets everyone on the same page early, so you don't end up with people assuming a different variation, researching only that, and then trying to do something different than you had planned on the actual climb.
  - However, this is also the one section where I intentionally don't share every bit of information I have. Tell people enough so they know the route & variations you have in mind, but don't necessarily send them links to every route description & trip report you've found. Make them research that stuff for themselves. They'll know it much better if they had to look it up themselves, and it may even encourage them to find a crucial trip report that your own searching didn't turn up.
  - Poke around in trip reports on PeakBagger.com. If one of them includes a GPS track you intend to follow, send out the link to it in this section, it's a fairly unambiguous way to get everyone onto the same page about the route & variation(s) you are intending to follow.
- The Plan
  - Give people a schedule, answering the following questions:
  - When & where is the meet-up time? (There may be more than one: a P&R one, and a trailhead one, etc., so be clear about each.)

- What's the *latest* you expect to be on the move? (I generally give no more than 30 minutes after the trail head meeting time.)
- What's the drop dead turn-around time? (If it's more than a one-day trip, then this applies to summit day.)
- If it's more than a one-day trip, also include:
  - What time do you want alarms set for on summit day?
  - What's the latest you expect everyone to be out of camp and moving on summit day?
- Finally (and optionally) if you like to add an informal restaurant and/or beer stop to the drive home, tell people what restaurant you have in mind here, it's much easier to make sure everyone knows about it and knows the location than trying to decide something on the fly after the climb. It's okay if you have to cancel this plan later due to the climb going late or something, everyone will understand.
- Personal Gear List
  - From a leadership standpoint, there's two types of personal gear:
    - First, there's the stuff that everyone obviously must bring, like helmets, harnesses, etc. You only need to spell that out for Basic climbs, but be sure your list is complete if you do spell it out, since people are likely to use it as their only reminder of what to pack. Mention the 10 essentials, but by all means reemphasize the most critical essentials for this trip.
    - Second, there's mode-of-travel stuff that's a judgement call. For example, snowshoes. Either everyone should bring snowshoes, or no one should bring snowshoes. You as the leader need to make the judgement call for everyone's sake if snowshoes are worth carrying, and then tell the group. Same goes for things like crampons and ice axes. Read recent trip reports (or trip reports from nearby peaks or routes if none are available for your chosen route) to get an idea how much snow to expect. You need to announce your decision on this for any climb, Basic or Intermediate. Avoid any split in the group's modes of travel like the plague (i.e. some with snowshoes and some without, or some with backcountry skis and some without.) Such a split is sure to separate the group, and separating the group makes it a lot harder to deal with any problems that come up.
- Group Gear
  - If it's an overnight, you need to decide what the minimum number of shared stoves, water filters, and bear bags (or canisters) will be necessary to run a clean & efficient camp. If you're unsure, I recommend roughly the following numbers:
    - Stoves: 1 stove per 2 or 3 people if snow melting is required. 1 per 4 people if freely running water is expected to be available.
    - Water filters: 1 per 3 or 4 people
    - bear bag, 1 per 2 or 3 people. Bear canisters: 1 per 2 people
  - My favorite way to organize Group Gear is to go to [drive.google.com](https://drive.google.com) and create a new Google Sheet. I list out all the group gear I'd like the group to carry, with

an empty space by each item for someone to write their name. I make it “editable” by everyone, send out the link to it, and let people fill it out themselves. This gets people to mostly self-organize and sign up to bring group gear. Finally, 24 hours before the climb starts, I look over the spreadsheet, and decide what to do about the remaining gaps (if any.)

- Here’s an example I might create for a 12-person glacier climb:  
[https://docs.google.com/spreadsheets/d/15GD7apkNXAu2Ubg424ZYDQcmUI6mzHnveyp5brOM\\_9E/edit?usp=sharing](https://docs.google.com/spreadsheets/d/15GD7apkNXAu2Ubg424ZYDQcmUI6mzHnveyp5brOM_9E/edit?usp=sharing)
- To save you time if you’d like, you can make a copy of my example, then just add or remove lines to change the group-gear to your liking, and share that with your group. The specific steps:
  - Click that link above.
  - Pull down “File” to “Make a copy...” Type a new name that includes your climb’s route-name and dates, then click “OK.”
  - Edit the sheet any way you’d like, adding or removing parts of it to make it specific to your trip.
  - Pull down “File” again to “Share...”
  - Change “Link sharing” to “Anyone with the link **can edit**” Copy the link, and paste it into an email to your group.

- In Case of Emergency

- I like to stick the following text under the heading “In Case of Emergency” at the bottom of my organizing emails. Feel free to copy mine, or write your own variation:

“Obviously, let’s be as safe as possible and do all that we can to prevent situations where an injury could occur. Acknowledging that—although rare—an accident could happen on our trip, let’s be prepared. All group members will carry individual small first aid kits for treating personal stuff and initially stopping bleeding, and a space blanket or bivy for emergency shelter. I’d like one volunteer to be our MOFA leader, who will bring a larger first aid kit and be responsible for assisting others in any first-aid scenario, not only the initial treatment, but potentially maintaining treatment over a 24-hour time period. I will carry a DeLorme InReach satellite communicator.

Please make sure your emergency contact person is up to date on [www.mountaineers.org](http://www.mountaineers.org) (on your profile page, click “Edit Profile,” then “Contact Info,” and look near the bottom.) If anyone has any medical conditions, allergies, or lingering injuries that could affect our trip or be important to know about in the event that you become injured or unconscious, you are welcome to shoot me an email. I’ll share that info with our MOFA leader as well, unless you ask me not to.”

- Personally, I always carry a DeLorme InReach satellite communicator, so I announce that here. If you do not, that's fine, but delete that sentence if you copy my text from here.
- On a few climbs, (I don't do this all the time, it's a judgement call,) depending on how cold and/or distant from the trailhead they will be, I take the emergency preparedness a bit further. If you end up with an incapacitated person who has to spend the night unexpectedly either on a one-day climb, or during a summit-push away from your base camp, your biggest challenge will be preventing them dying from hypothermia while laying on the snow or being snowed on. So, sometimes I include the following text as well:
 

“I'd like three more volunteers to each bring one minimal hope-we-don't-use-it item, preferably <1lb each, for keeping an incapacitated person warm: 1. A light sleeping pad (3/4th length pad okay, any material) 2. A light tarp (7'x7' or larger preferred. A spare tent-fly is okay. Not a “space blanket.”) 3. A light stove (MSR Reactor or similar recommended.)”

To give some concrete examples, below are links to a few organizing emails I've written in the past. I have a reputation for writing extremely long & detailed organizing emails, that's just part of my personal leadership style, and it does NOT have to be part of yours. If you feel you can clearly communicate the important points in fewer words, go for it. Again, the point here is not for you to copy my leadership style, but rather to develop your own style, only incorporating the bits and pieces of my ideas that you like.

- Organizing a one-day Basic rock climb:  
<https://www.dropbox.com/s/35jc16g1mk850vl/Gmail%20-%20The%20Tooth%20-%20Saturday%2C%20May%2016th.pdf?dl=0>
- Organizing a day with experienced climbers & peers, where a lot less needed to be said:  
[https://www.dropbox.com/s/zfy3byzg8jsgc5m/Gmail%20-%20Sunday%20Climbing%20in%20the%20Tatoosh\\_.pdf?dl=0](https://www.dropbox.com/s/zfy3byzg8jsgc5m/Gmail%20-%20Sunday%20Climbing%20in%20the%20Tatoosh_.pdf?dl=0)
- Organizing an overnight Basic glacier climb: (this one happens to be a massive beast of an email, probably the biggest I'll ever write)  
<https://www.dropbox.com/s/bwxnox86psnro5x/Gmail%20-%20Mt%20Shuksan%2C%20Sulphide%20Glacier%20-%20July%2018th%20%26%2019th.pdf?dl=0>

## **Liability, a Legal Perspective**

I am not a lawyer. Once I listened to a presentation by Ruth Nielson, the lawyer for the Mountaineers, so the following is the best of my understanding coming away from that:

First, defining some legal terms:



“Ordinary care” → “Ordinary care for an adult means the care a reasonably careful adult person or corporation would exercise under the same or similar circumstances.”

“Negligence” → “Negligence is the failure to exercise ordinary care. It is the doing of some act that a reasonably careful person would not do, or the failure to do some act that a reasonably careful person would have done, under the same or similar circumstances.”

“Standard of Care” → What is the rest of the industry doing?

We, the Mountaineers, are (much of the time) relatively more-experienced people taking less-experienced people into the backcountry. Since paid vs unpaid makes little difference in the eyes of the legal system (notice that distinction is not even mentioned in the definition of “ordinary care” or “negligence” above,) then the “Standard of Care” that we are compared to encompasses any similar industry, paid or unpaid. In other words, although we are not a guide service, we are very likely to be compared to a guide service if anything goes to court. Guide services are likely to be the “Standard of Care” we are compared to. This does not mean we have to become a guide service, but it does suggest we should keep our safety margins similar-to or better-than them. You are not required to do any of the following (and we do NOT want to require you to, because then the Mountaineers would be liable for any leader who doesn’t meet a written requirement,) but some things to think about:

- Guide services use WFR (Wilderness First Responder) as the standard first aid certification for guides. If you are interested in becoming WFR certified, that’s optional, but the Climbing Committee would like to encourage it, so there’s a good chance they’ll at least help you with the course fee. See here:  
<https://www.mountaineers.org/about/branches-committees/seattle-branch/committees/seattle-climbing-committee/seattle-climbing-website/climbing-education>
- Many, if not most, Guide services are carrying some form of satellite communication these days. You are not required to carry one, but if you’re interested in doing so, the Climbing Committee is interested in helping you.
  - The Climbing Committee is currently setting up a program where the committee will purchase a number of simple PLB’s (I think ACR ResQLinks?) that’ll be available for Seattle Climb Leaders to check out and take on their climbs if they wish.
  - If you want a satellite communicator that you own instead of check out, personally, I *highly* recommend the DeLorme InReach satellite messenger, I bring mine on every trip. It’s better than a Spot three ways: (1) It uses the Iridium satellite network instead of Globalstar. Iridium has better coverage and reliability, whereas Globalstar every now and then loses messages. (2) You can type and send free-form text messages (160 characters) to actually describe your problem, vs Spot where you cannot describe your problem. (3) InReach communication is 2-way, and Spot is 1-way. If you push the SOS button on a Spot, you get no response or confirmation if help is coming or not, but you DO with an InReach. Lastly, if you get the “Explorer” version, with the orange faceplate, it has some basic GPS capabilities as well, letting you record and view waypoints & routes on the InReach’s own screen. It’s primitive, but it was enough to replace my existing

GPS, so the net number of things I'm carrying did not increase. I happily use the cheapest "Safety" plan, which ends up costing me about \$13 per month after tax, and is still very full-featured. Buy the device through Promotive to get a discount there.

Why would anything go to court? Let's say you (the leader) know all the members of your climb pretty well, and you can't imagine any of them would try to sue you. You're probably right, but probably right is not the same thing as a guarantee. A written waiver is a lot closer to a guarantee. More concerning though: what about the family of a climb participant? Odds are you've never met their family, so who knows what their likelihood of suing is? I hope to God none of us ever have to deal with a fatality on a climb, but no matter how careful we are, there is still a chance that one could happen. After a fatality, that person would no longer be able to speak for themselves, and so the next steps would be totally up to their family members. If their family members perceive you to having been that individual's teacher or care-taker, which they very likely will, then that is what you will be perceived as in the eyes of a jury too. Again, the best defense is a written waiver. Written waivers are very powerful, and have a high likelihood of preventing things from going to court in the first place, as long as the leader wasn't grossly negligent. In the Mountaineers, the key to getting any activity you lead covered by the Mountaineer's waiver is to **post it on the website**. If you post an activity on the website, then the waiver applies to it, it's unlikely that a lawsuit would even go to court, and the Mountaineer's legal team would help defend you if one did. If you do not post an activity on the website, then the waiver does NOT apply to that activity, and the Mountaineer's legal team will NOT defend you, you will be totally on your own if anything happens that makes someone think about suing you. Just in case that wasn't clear enough, the key takeaway: **post everything you do with students on the Mountaineers website!!**

## Keeping the Group Together

Why keep the group together?

- Obviously, no one should ever go off alone for anything more than a bathroom break. I understand that some people prefer solo experiences in the wilderness, and I'm fine with people choosing that for themselves on their own climbs, but never ever on an official Mountaineers climbs. Everyone is human, everyone is mortal; mistakes and accidents happen to even the most competent & experienced climbers, and the soloist has no one to help them or go for help if a freak accident occurs.
- If anything goes wrong, you have a lot more resources to deal with the problem. Example: end of the day, and the only thing left to do is a few hours of hiking back to the car. One especially worn out climber is going slower than the rest of the group, and they really encourage everyone else to "Go at your own speed guys, I'll meet you down at the parking lot." Let's say you, the leader, lets everyone accept that offer while you alone stay back with the slow climber. After the rest of the group gets out of sight, what do you do if the slow climber sprains an ankle and can no longer carry their pack? You'd have

to carry two full ones, rather than spread the weight of the items amongst the whole group. Or let's say it's a hot day, and you find out that climber was slow because they're dehydrated and totally out of water. You may be faced with splitting what little water you personally have left with them, if you have any left at all, rather than collecting a small amount from everyone in the group. Solving problems is much easier with more people and more gear around, so keep everyone together, don't let faster climbers in your party get ahead and out of earshot.

- If anything goes wrong, you'll be there to personally help address the problem. Say you're on a 4-person rock climb of the Liberty Bell Beckey Route, a relatively easy Intermediate route. At the notch between Liberty Bell and Concord Tower everyone dons harnesses, someone explains that they've felt a bit nauseous since they woke up and had expected the feeling to go away, but instead it's gotten worse and they won't be able to climb. You certainly can't leave someone feeling sick of an unknown cause alone for many hours on end, so you stay with them, and allow the other two Intermediate students to do the route while you wait. They go up, and then you don't hear from them for a while. Their expected return time comes and goes, and still no word from them. Sunset approaches. Did they get off route? Was someone injured? What if the nauseous climber's condition deteriorates while you're waiting? You cannot be in two places at once, so it may have been wiser to turn everyone back together if one person cannot continue.
- Getting a split group back together is really, really difficult. You may agree on a meeting time or place, but what if you get there and the others aren't there? Are they late? Did they misunderstand the meeting spot? A true story that happened to me: When descending a Basic climb, our party had gotten pretty spread out down the mountain. I needed to stop and help someone near the back, and sent an Intermediate student ahead to catch the group further down. Briefly, that Intermediate student was out of sight of both groups due to the thick forest, and at that point happened to land on a different branch of the faint, braided climber's trail than what the group ahead had chosen. A while later, the Intermediate student radioed me to say they realized they were lost. We could communicate clearly on the radio, but all they were able to tell for certain about their location was that there were trees everywhere around them. We were both in the forest. Relative to me, were they to the left or the right? Were they below me, or had I descended below them at that point? Once separated, it was extremely hard to answer these otherwise simple questions, even with the radio. Fortunately there was only one maintained trail down below, and once we both independently reached that, we guessed correctly on the left-or-right question and met up, but it was a strong reminder of how hard it can be to get a group back together after it separates.
- "Wait here" is much easier said than done. Most people have no idea how cold they'll really get sitting still, and even if they've packed a lot of cloths, it may not be enough to wait out the hours & hours that could pass if they're waiting for the rest of the group to do anything technical. Unless "here" is a camp with a tent, sleeping bag, stove, & extra water, do not leave a portion of the party behind anywhere. And even then, unless the person is in good condition and of a clear mind, don't leave them their alone (i.e. if the

person is sick, injured, or even just has show evidence of acting foolishly, make sure someone stays with them.)

- Given that it is important to keep the group together, avoid any differences within the group in terms of mode of travel, since such differences naturally pressure the group to separate. Some classic examples are a group with some people on skis and some on snowshoes, or a group where some people have snowshoes and some do not, or some brought crampons and some did not. If a difference of equipment allows some but not all of the group to cross certain terrain (an icy slope, or deep postholing snow,) then it'll be hard to avoid someone uttering the dangerous words "You guys go ahead without us," or worse a difference in speed of travel will cause the group to separate before anyone realizes it's happening (people on skis well out of earshot ahead of the snowshoers on descent.)

## **Conclusion**

Volunteers are the lifeblood of the Mountaineers, and Climb Leaders especially so. Without them, we would not have much of a club. So, if you put the effort in to become a Climb Leader, and do it well, then thank you!! Thank you so much! You are what keeps this organization alive. If I had to summarize, I'd say that I evaluate leader applications based on what the applicant has shown in terms of teaching, experience, and judgement. And, the bare minimum that I expect from a leader is to (1) keep people safe, (2) keep the trip on-schedule, and (3) set the group up for it's best potential for success.