AMC SOUTHEASTERN MASSACHUSETTS CHAPTER
YOUR CONNECTION TO THE OUTDOORS

Administrative Aspects of Leading Hikes with the AMC Southeastern Mass. Chapter Hiking Committee

Summary information from latest
AMC's Outdoor Leader Handbook and AMC Leadership Requirements & Guidelines

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1. Planning your hike

Lead the type of hikes that give you the most joy, it will come across to your participants. Perhaps it's a family hike, an urban walk, a series you want to create, a destination hike, a hut overnight or multi day backpack along the AT. The options are endless, don't let what we are doing now stifle your creativity to do something new.

Although there is nothing wrong with having multiple hike offerings on the same day, as a smaller chapter it's more likely that there are days with no offerings. If your schedule is flexible:

1. Check the live listings and try to pick a day which does not already have a hike offering.
2. See if your local hike can be one of the Thursday Morning Local Hikes or Weekend Local Hikes. Under 'For Leaders', click on the 'Planning Spreadsheet' link to see what weeks are available.

If you are planning a destination hike, you may want to suggest car-pooling to reduce our carbon footprint.

If there are public transportation options for getting to the trailhead it's a good idea to mention them in the hike listing, this opens your hike to a broader, more diverse, audience, including those who may not own a car.

We prefer you to list your hike as soon as you have completed planning even if it's a long way out. This gives people the chance to see what's upcoming and plan their calendar. In addition, when the site has lots of hikes listed people are more likely to return to the site. For hikes you list early you can always set the registration start date to be closer to the event.

2. Listing SEM Hikes on the AMC trip listing system ActDB

Once recognized as a SEM Hiking Leader, the Chapter Chair or their delegate will provide you with permission to post trip listings on the AMC online activities database (ActDB). When posting your first hike,you may want to ask your mentor to help you. While it feels cumbersome at first, it's not so bad once you get the hang of it. Here's the link to the Complete user guide for ActDB trip posting.

A summary of the trip review and approval workflow is as follows:

1. You enter trips and submit them to Reviewers.
2. Reviewers review and submit trips to Approvers. Reviewers for the Hiking Committee include the Hiking Chair and usually one or more additional people such as the Hiking Vice Chair.
3. Approvers approve trips for posting on the web. Approvers include the Chapter Chair or their delegate.
4. If approved the trip goes live on the web. If not approved at either step 2 or 3 above, it is returned to you for updating. The reviewer or approver will communicate the updates needed via email or a phone call.

Reviewers and approvers often review and approve the trips the same day or the day after they are submitted but sometimes it takes a few days. Unless it is urgent that your trip be reviewed right away, please give a few days for your trip to appear live on the web before contacting them. You can get contact info for the reviewers and approvers under My Approval Workflow on the ActDB Admin Dashboard, under Committee select 'Hiking' from the dropdown list of committees.

Once a trip listing has been fully approved and posted on the online system, it is very difficult to make modifications. This often involves contacting an approver since reviewers cannot change live listings. You may have to cancel the trip and then submit a new listing for review and approval all over again.

When you initially list the trip, the system will indicate its status as 'Open'. For trips requiring online registration, you can optionally enter the maximum number of participants that you will accept on the trip and, if you wish, provide a waitlist count. The system will automatically update the status to waitlisted once you have confirmed the maximum number of participants for the trip. The system updates the status to 'Full' if you have waitlisted the maximum number of people on your waitlist.

Once your approved trip is live on the web you may, if you wish, promote the hike on our SEM meetup group. For information on how to post a trip to our meetup group read the Meetup Guidelines for SEM Leaders.

3. Screening and registering hike participants

There are four choices for screening and registering your hike participants:

Registration - Not Required

For some easier local trips, leaders list the trip as not requiring pre-registration, these are colloquially called ‘Show and Go’ hikes and are listed on ActDB as Registration ‘Not Required’. On these hikes all the information about the hike, including where and when to meet, are provided in the hike description. Leaders do a basic screening of participants at the trailhead and participants sign a paper waiver.

Since on this type of hike you do not have a list of participants emails, if you think you may have to cancel the hike you should add a sentence to your hike description to the effect:

> *Occasionally hikes may need to be canceled, for example due to inclement weather. Please recheck the listing on the morning of the hike. If the leader needed to cancel the hike, the listing will indicate that it is canceled.*

Some leaders also send out a SNEL (Short Notice Email List). However the membership of the SNEL is only a few hundred.

Registration Required - Contact Registrar

With this option, interested participants are directed to contact you by email or phone to register.

Some leaders prefer this option for their hikes as it allows them to screen potential participants prior to arriving at the trailhead. Like ‘Show and Go’ hikes, it allows people to register who do not have an AMC account and so might attract more hikers who are not yet AMC members.

Leaders manually manage the number of participants that they want on their hike and change the status in ActDB to full themselves. Interested participants can still email them, even though the hike will show as full on the activity listing system. At the trailhead all the participants sign a paper waiver.

Some leaders like this option when they post multi week series. Leaders list each hike in the series on ActDB as Registration ‘Required - Contact Registrar’. ActDB allows you to post recurring hikes in one go. Interested participants contact the registrar just once for the whole series. You screen the participants and then add them to your own email distribution list of approved participants. Prior to each hike, you email all the approved participants the location of the next hike.

With this option you must provide either your phone number or an email as your contact information. If you provide an email, you can choose for it to show on the listing or be hidden. If hidden, the live listing will just show a link that the interested participant can click to complete a form that they submit and ActDB will email it to you. With scammers searching for phone numbers and emails on the web, we suggest you use an email not a phone number, and select in ActDB ‘Email on Web’ as ‘No’ don’t show.

Registration Required - Electronic Waiver

This is by far the most used option, leaders list the trip on ActDB as Registration 'Required - Electronic Waiver'. For this option the interested participant must have an AMC account (it's free to create an account). The participant will complete a form, including signing an electronic waiver, when they register. ActDB will then email you that an interested participant has registered. You need to log into ActDB and go to your 'Dashboard', from here you can get the contact information of the interested participant for screening. Once you have screened the participant you set them in ActDB as Awaiting Review, Waitlisted, Confirmed or Canceled.

This is the only option where you do not need participants to sign a paper waiver. This saves time at the trailhead which is important during the winter so folks don't get cold.

With this option you can also set a registration start and end date. If you wish to accept someone after the registration end date, you can choose to have them show up at the trailhead and have just that person sign a paper waiver. You can also set a participant and waitlist count.

Registration Required - External URL

The Registration option 'Required - External URL' allows you to create your own form or web page and direct a user to this site for registration information. It is generally not used for SEM hikes but may be used for other committee events like zoom meetings, training etc.

You can find more details about the ActDB registration options in the Complete user guide. Also, you may want to ask your mentor to help you when posting your first hike. The system can seem a little intimidating at first but you start to warm up to it after posting a few hikes.

Leaders or Leaders-In-Training use the registration process to screen participants before approving them for a hike. Screening can be via email, telephone, casual discussion with other leader(s) whom they hiked with, or a combination of all three.

Although probably a bit overkill for easier hikes, here's a handy Trip Screening Form you can use to help you perform this screening. For most hikes, you can usually screen potential candidates by just asking them a few simple questions, such as: "Have you hiked with the AMC before?" "What hikes have you done recently?" (rather than at some undetermined point in the past…), and "What is your general physical condition?" It's also often a good idea to ask if the candidate has basic equipment such as appropriate (non-cotton) hiking duds, rain gear, well broken-in hiking boots, and good wool hiking socks. Based on their answers to these basic questions, you can usually determine whether or not you need to delve deeper into their recent experience, skill level, physical condition, or equipment.

If the leader/leader-in-training determines that the individual being screened is not up for this particular hike, they should recommend one or more alternate hikes that may be more appropriate for the individual's experience/fitness/capability level (and thus more enjoyable). Please always remember to be polite and respectful.

4. Preparing the 'info sheet'

For local hikes, some leaders put all the information needed into the hike description, others send an email a couple of days before the scheduled trip (ActDB has a simple emailing system that does not allow attachments), others create a separate 'Information sheet' that they send as an attachment to an email.

For more intricate destination hikes, a week or two prior to the start date of the scheduled trip, one of the leaders prepares and sends a comprehensive Information ('info') Sheet to all approved participants. The info sheet should include contact information for the leaders, a brief description of the hike, meeting time and location, and a checklist of what to wear and bring. You may also include carpooling suggestions. Here are Example Hike Listing Info sheets. Some leaders include additional information such as a trail map with the route highlighted.

5. AMC Trip Sign In/Waiver Form

The AMC requires us to have all hike participants including leaders in training to read and sign an electronic or paper waiver form before participating in an AMC hike. Signing the waiver is either part of the online registration process or done at the trailhead at the start of the activity itself by signing a paper waiver form (Volunteer Release Agreement).

In addition to protecting the club (and our leaders) from legal liability, it serves several other purposes. These include providing an accurate roster of all hike participants (including leaders in training but not the leader) and capturing contact names and phone numbers in case of an emergency.

The hike leader or their designee is responsible for making sure all participants complete the waiver online or on paper. This can be verified by checking the registration listing for your activity as part of approving each participant. A roster of participants should be printed from the online list and carried by the leader on the hike. Note there are different formats for printing the roster and the simplest may be html if your browser formatting looks ok, but other formats are available (pdf etc.)

For any pictures taken on the hike which include people and which you want to send to the Breeze or post to our Facebook page you need to get consent from those in the picture. You can ask anyone that does not want to be in the picture to step aside. For training events, such as the Winter Hiking Workshop, you can have participants sign the AMC Group Photo Release Form.

6. Post-activity steps / reports

- The roster does not need to be sent to AMC.
- If a paper waiver form (Volunteer Release Agreement) was used by any participants on your trip, once the trip is complete either the leader or their designee should follow the instructions as listed at the bottom of the form and send a copy to AMC. After a copy is sent the signed paper form(s) can be shredded or discarded securely.
- If the trip is in the New Hampshire White Mountain region the White Mountain National Forest Summary of Use Report needs to be completed and needs to be emailed, or mailed, as per instructions on the form.
- File an AMC Incident Report for any injuries that required the individual to be taken to a medical facility. If you're unsure whether an incident report should be filed, ask your hiking chair. You can email HikingChair@amcsem.org.
- Optionally send pictures to the Communications Chair for possible use in social media for the chapter or in a subsequent Breeze newsletter. Only send pictures where all people in the picture have agreed to allow pictures to be distributed.

7. Trips with a fee

When you're planning a trip that will include a participant fee, you will need to calculate the fee before you list the trip. You can run your trip at cost, or add some dollar amount as SEM revenue, and it will go to supporting the goals of the chapter.

When you post the activity, tell the participant what they are getting for the fee, for example, fee includes two night's lodging at Lonesome Lake Hut, all group meals from Friday night dinner through Sunday morning breakfast, and a group tip for the caretaker.

When your participants have been screened and registered, send them an email with payment instructions. Your cancelation policy should be clearly spelled out in the email. Checks should be written to AMC SEM and mailed to our treasurer. Leaders should not deposit money into their own account.

If you have many participants where it will not make a significant difference to the per person cost, you may want to have the leaders attend for free.

If you get a cancellation, the general requirement for the person to get reimbursed is that their pulling out should not adversely impact the remaining participants. So, for example if the trip did not fill and you had to pay for the whole cabin, you should not ask the remaining participants to chip in more so you can reimburse the person who pulled out.

If you're staying at AMC huts or lodges, for every 9 paying guests, the leaders get one free complimentary room. It's actually better than that and the complete list of leader benefits are on our website under Leadership ▯ AMC Chapter Group and Leader Benefits. If you're the person who planned the event, then you should take the first comp room.

There is a form to help you work out your income and expenses on our website under documents ▯ Financial Statement (use of this is optional). Keep receipts and once your trip is done fill out an Expense Reimbursement form. We reimburse purchases on behalf of the group trip, such as group food, but not personal expenses traveling to the event such as gas.

8. Quarterly Hike Planning Meetings

It's encouraged that you participate in the Hiking Committee's quarterly hike planning meetings if your schedule allows. These meetings go over important 'breaking' information. They also provide a great opportunity for leaders to ask for second leaders on more difficult hikes and connect with leaders in training.

We try to arrange for at least one of these quarterly meetings to be a face-to-face meeting (rather than a video-conference), in a more-or-less centrally located location.

The planning meetings are held the first Wednesday of the month in March, June, September, and December.

9. Email distribution lists

We ask that all active SEM hike leaders remain subscribed to the following two email distribution lists:

1. SEM - Hiking Leaders - This group is used by the Hiking Chair and Hiking Vice Chair to send important communications to all the hike leaders. You cannot reply to these emails. We keep these communications generally to no more than one a week. The well-known 'Hiking Shorts' are sent out to this distribution list. If you have unsubscribed from this list and are not getting these communications, please email hikingchair@amcsem.org
2. SEM - Hiking Chat - This group is for leaders to communicate with one another, for example you can ask for second leaders for your hikes. You can go into the group and change the frequency of emails you get from every email as it's posted, a daily digest where emails are bundled together or no emails.

10. AMC Volunteer Resources:

- AMC's Outdoor Leader Handbook
- AMC Leadership Requirements & Guidelines & SEM Leadership Requirements & Guidelines
- AMC Code of Conduct
- Trip planning guides:
  - AMC Activities Database (ActDB) Complete user guide
  - Trip Screening Form
  - Example Hike Listing Info sheets
- Frequently used forms:
  - Volunteer Release Agreement
  - AMC Group Photo Release Form
  - White Mountain National Forest Summary of Use Report
  - AMC Incident Report
- Links to systems:
  - AMC online activities database (ActDB)
  - SEM meetup group

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