



Outdoor Leadership Development Committee
Originally Issued by OLDC on April 24th, 2004 &
Approved by Board of Directors on May 6th, 2004

Revised January 26, 2019

Effective March 15, 2019

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 three years after the most recent effective date. Additional reviews and changes may be made as necessary outside of the triennial revision process. The OLDC welcomes questions, comments and feedback regarding this document at <leadership@outdoors.org>.

~ Contents ~

Introduction and Definitions.....	2
Liability Insurance Coverage	2
Requirements for Club Units	3
Guidelines for Club Units	4
Requirements for Leaders	5
Guidelines for Leaders	6
Requirements for Activities	8

Introduction and Definitions

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 shall 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 shall 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. Adventure Travel, Inter-chapter Paddling Committee) and Volunteer-led Camps and Cabins (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, meetings, basic services and meals (i.e. potluck dinners, picnics, barbecues, cocktail hours, slide shows, speaker presentations, facility stays, equipment rental) are exempt from the requirements of this document 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 assist the AMC in developing requirements and guidelines for high quality volunteer-led Activities. 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 Leaders 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 an assistant leader function(s) (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 shall 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 shall 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.

Approval of Activities

- Club Units shall designate one or more persons for the purpose of approving Activities sponsored by that Club Unit.
- Club Units sponsoring Activities involving outside organizations shall ensure that the jointly sponsored activity meets the standards of the sponsoring Club Unit and has an approved AMC Leader.
- Club Units shall 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, leaders must follow rules as outlined in their Club Unit's Financial Policies. When there is a conflict, AMC policies as set by the organization's Chief Financial Officer (CFO) take precedence over Club Unit. This policy may or may not include reimbursing Leaders for trip expenses and/or providing for free trips for Leaders. This policy shall NOT include any compensation for Leaders BEYOND direct reimbursement for trip expenses and/or a free trip. Club Units are 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, and stand up paddleboarding (SUP).

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

- Club Units shall 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.
- Club Units are authorized to approve activities within the fields of expertise of their approved Leaders, as long as the Activity does not require travel to any location greater than 500 miles from any Chapter's region, 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 Adventure Travel and must be approved by the Adventure Travel Committee.

Leadership

- A Club Unit shall establish leadership qualification criteria for Activities it sponsors. These criteria shall include at least 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 shall make reasonable efforts to 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 shall 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 concerns, code of conduct violations, 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 10 City Square, Boston, MA 02129 or leadership@outdoors.org.
- A sponsoring club unit shall maintain a roster of its qualified leaders including name, address, membership number, expiration date, phone number, and email. This roster must be updated at minimum once annually to reflect changes via the Activities Database (ActDB) (<https://activities.outdoors.org>).
- Trip listings must be screened prior to approval in order to determine that the trip meets the requirements as referenced in the *Approval of Activities* section above.
- In the event of a reportable accident or incident (described below in *Requirements for Leaders*), the volunteers involved (e.g. activity Leader(s), sponsoring activity committee chair(s), camp trip coordinator, chapter chair, regional director, etc.) shall cooperate with the Leadership and Risk Management Department in providing background information and reports regarding the event as may be requested by the Club’s legal counsel or the Leadership and Risk Management Department. Those directly involved with the event must refer inquiries to the Leadership and Risk Management Department for an official statement by the Club and shall avoid giving statements to the press, making public statements, or posting information related to the incident to social media outlets.

Club Units are encouraged to develop a process to manage complaints, disputes and issues related to their operations. Criteria which could result in a conflict, dispute or incident shifting from management at the local club unit level to a Club-wide committee include:

- Illegal acts or allegations of illegal acts
- Police actions
- Circumstances involving allegations of discrimination based on race, creed, color, national origin, ethnic origin, gender, sexual orientation, marital status, age or physical ability.
- Circumstances or incidents involving litigation or threats of litigation.
- Issues or conflicts with the potential to have a significant detrimental impact on the AMC’s reputation.

In the event that a dispute cannot be resolved at the Club Unit level, the dispute will be elevated for review by the AMC Volunteer Resolution Committee.

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 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 and communication
- Dealing with emergencies, accident scene management
- AMC leadership philosophy regarding environment and conservation

- Leadership Requirements and Guidelines
- Diversity, equity, and inclusion (DEI)

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 make reasonable efforts to ensure that their Activity meets the *Requirements 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.
- Leaders must provide their sponsoring Club Unit with their name, address, phone number, membership number, expiration date and email.

Participants and Activity Management

- Leaders may not exclude persons from an Activity on the basis of membership status, race, religion, color, national and ethnic origin, gender, sexual preference, marital status, age (except minors), or differing physical abilities 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. See <http://www.outdoors.org/volunteers/forms/youth-participation-information.cfm> for additional information on minor participants on standard volunteer-led outings. See https://www.outdoors.org/wp-content/uploads/2017/06/amc_eec-5.pdf for the AMC's **Essential Eligibility Criteria** (EEC) which detail the physical and cognitive requirements related to official activities.
- The participant is required to sign an approved AMC release when participating in an officially sanctioned AMC activity.
- 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:
 - Acknowledgement and Assumption of Risks & Release Agreement for AMC Volunteer-Led Activities
 - AMC Volunteer-Led Adventure Travel Acknowledgement and Assumption of Risks & Release and Indemnity Agreement
 - AMC Volunteer-led Camps and Cabins (VCC) 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.
- When co-sponsoring an activity with an outside organization, it is the responsibility of the Leader to identify the responsibilities and services provided by each organization (emergency response, participant screening, etc.). Participants should be made aware of the nature of the co-sponsored arrangement and the specific responsibilities as well (this information should be included in the trip listing or a pre-trip briefing).

- If, in the course of any Activity, an accident or incident occurs that meets any of the following criteria, the Leader must file a Volunteer Accident/Incident Report Form as soon as possible with the sponsoring Club Unit and with the Leadership and Risk Management Department. Accidents and incidents requiring reporting are as follows:
 - Incident response involves the use of outside agencies (police, hospital, emergency response, search and rescue, etc.).
 - The participant involved in the incident receives professional medical care (to the knowledge of the Leader), professional medical care is recommended by the Leader, or the participant refuses the offer or recommendation of professional medical care.
 - 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 (800-217-7975) 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 [AMC Chapter Crisis Communication Chart](#).
 - A Leader may file an incident report under other circumstances at his or her discretion, including concerns relating to adherence to the Code of Conduct. In addition, leaders and participants are encouraged to report potential violations of AMC's Code of Conduct to codeofconduct@outdoors.org. 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.

Equipment

- Leaders must check that all participants are equipped with Activity-appropriate safety equipment and that it is used at all appropriate times.
 - On all outdoor 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.
 - 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.
 - Personal floatation devices (PFDs) must be worn at all times when paddling Activity Leaders or participants are on the water with the exception of flat water boating Activities. On flat water boating Activities PFDs must be present for all Leaders and participants in their boat at all times.
 - Trail work requires safety precautions beyond that of a recreational hike and use of appropriate Personal Protective Equipment (PPE). The leader is required to determine the PPE or other equipment necessary for each project, and that it is used consistently and correctly by participants.
- 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 make reasonable efforts to 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 on an appropriate course of action to manage the accident scene.

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

- When a trip is posted in the Activities Database the following information should be included;
 - Detail of the trip objectives including a description of the type of activity.
 - Geographic location
 - Duration
 - Level of difficulty, including required training, experience, and prerequisites.
 - Required equipment
 - The meeting time
 - Cancellation policies & procedures
- 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.
- Leaders should strive to be complete, concise, and clear in all communications to participants.

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 group work or objectives, or inappropriate behavior. Minors (under age 18) may be excluded for any of the above reasons and must be 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, the chair of your volunteer club unit, or the Leadership Training and Risk Management Department (603-466-8054).

- 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 their 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.
- Leaders should carry appropriate information resources, such as guidebooks, maps, etc. as applicable in the event that the Activity plan must be modified.
- Leaders should designate sufficient assistant leaders, for duties such as lead, sweep, sub-group leader, or others, to make reasonable efforts to minimize participant risk.
- Leaders should designate only persons as assistant leaders who have the skills required for the tasks assigned.
- Leaders should set and maintain a pace appropriate for the group and consistent with the description of the Activity. There may be times where a slower pace is necessary, especially if the current pace is compromising group management. In the interest of safety, try to keep the group together.
- There may be times when it is advisable to divide large groups into smaller, independent sub-groups or restrict the number of participants for the activity. 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, the Leader 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 ensure 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.
- An approved Activity must be announced or publicized to the public through the Activities Database (ActDB) and its established approval processes (with the exception of the two circumstances noted below). This is the primary method of posting an approved trip.
- The following methods are suitable as secondary announcements or publications as derived from or referencing an approved Activity listed on the Activities Database:
 - **AMC Outdoors** – The club's member magazine
 - **Sponsoring Club Unit Publications** – Schedules, newsletters, chapter websites, etc.
 - **Electronic Media** – Electronic announcements (such as web site listings, internet groups, e-mail listservs, social media, MeetUp, etc.) are acceptable as long as they are presented through a system maintained by the sponsoring Club Unit provided that the Activities are approved by a moderator authorized to represent the sponsoring Club Unit and the Activity meets all relevant requirements. The posting of Activities by individuals to read and write public accessible newsgroups or bulletin board systems or the sending of messages to an email list by persons not appointed to do so by a Club Unit are not acceptable.

The following two items are exceptions to the trip posting parameters as outlined above:

1. Postings – Events such as Fall Hiking Week and Fall Gathering, and Volunteer-led Camps and Cabins (VCC) facilities generally post a list at the beginning of each week, or other time period, of their approved Activities scheduled for that period.
2. For events where time restraints or urgency of the situation necessitate immediate posting (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 enter these activities in the Activities Database first for the purposes of leader member verification. Where there is urgency, they may post to other media after the trip is in queue for Approval.

Please direct all questions or concerns to the AMC Leadership Training and Risk Management Department at leadership@outdoors.org.