



Leadership Requirements and Guidelines

Outdoor Leadership Development Committee

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The Outdoor Leadership Development Committee (OLDC) is an organization-wide committee composed of Appalachian Mountain Club (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 AMC's members and the public through ensuring that physical and emotional safety, quality, and cultivating belonging 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.

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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 must be met by all Club Units and Leaders. Club Units may impose additional requirements appropriate to their Activities and must 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 must be met by all Club Units and Leaders except where it is not possible or in the best interests of Activity participants to do so. Such exceptions may be because of the nature of the Activity or situations arising while the Activity is in progress. Excluding those instances, Leaders must always meet these guidelines 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., Western Massachusetts, 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).
- A **Leader** is any person authorized by a Club Unit to lead or assist in the leadership of an AMC Activity. A Leader in good standing is a person regarded as having complied with all their explicit obligations, while not being subject to any form of sanction, suspension, or disciplinary censure.
- 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. Social events, meetings, basic services and meals (e.g., potluck dinners, picnics, barbecues, cocktail hours, slide shows, speaker presentations, facility stays, equipment rental) are exempt from the requirements and guidelines of this document.
- 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 well-being of Activity participants first, regardless of the requirements and guidelines listed in this document.

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 must 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 and may not waive any requirement in this document without the permission of the OLDC.

Approval of Activities

- Club Units must designate one or more persons for the purpose of approving Activities sponsored by that Club Unit.
- Club Units sponsoring Activities involving outside organizations must ensure that the jointly sponsored activity meets the standards of the sponsoring Club Unit and has an approved AMC Leader.
- Club Units must ensure that the Activities they sponsor are led by one or more individuals approved as Leaders for that Activity.
- If a Club Unit sponsors activities that require Leaders to collect money from participants, 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 Activity expenses and/or providing for free activities for Leaders. This policy must NOT include any compensation for Leaders BEYOND direct reimbursement for activity expenses and/or a free Activity. 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 Risk Management Department.

- Club Units must 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, if 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 more than 500 miles from the AMC region or longer than 10 days are classified as Adventure Travel and must be approved by the Adventure Travel Committee.

Leadership

- A Club Unit must establish leadership qualification criteria for the Activities it sponsors. These criteria must include at least one of the following: (a) successful completion of any AMC sponsored leadership training meeting the guidelines described below, as determined by the trainers or facilitators; (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.

- Club Units must make reasonable efforts to solicit feedback from Leaders, Activity participants, and other persons. A transparent system must support the review and follow up communication with both the person submitting and the individual receiving the feedback.
- A Club Unit must publish its leadership qualification criteria and other leadership requirements in a manner easily accessible to existing and prospective leaders including a publicly accessible means of contact.
- The sponsoring Club Unit must make reasonable efforts to ensure that all Leaders possess the requisite interpersonal and 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 must 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 or limit the leadership status of an individual in response to code of conduct violations, and/or a failure to exercise situationally appropriate leadership skills that affect the physical or emotional safety of participants during 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 Training Department at 10 City Square, Boston, MA 02129 or leadership@outdoors.org.
- A sponsoring Club Unit must maintain a roster of its qualified Leaders, including name, phone number and email, in the Activities Database (ActDB). This roster must be maintained and kept up to date.
- Before approving an Activity, the person designated by the Club Unit must verify the Activity listing meets all 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, and regional director) must cooperate with the Leadership Training and/or Risk Management Departments in providing background information and reports regarding the event as may be requested by the Club's legal counsel or the Appalachian Mountain Club. Those directly involved with the event must refer inquiries to the AMC for an official statement by the organization and must not give statements to the press, make public statements, or post information related to the incident to social media outlets.

Club Units must 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 any protected class
- Circumstances or incidents involving litigation or threats of litigation, and
- Issues or conflicts with the potential to have a significant detrimental impact on the AMC's reputation.

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

Training

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. Leadership training must cover the following topics in a manner and detail appropriate to the types of Activities the Leader will be approved to lead.

Required Elements of Leadership Training:

- Activity planning and management

- Screening of potential participants for an Activity
- Risk management & leader liability, including AMC's Leadership Requirements & Guidelines
- Leadership approaches (formerly styles)
- People skills including group dynamics, interpersonal communication, and feedback
- AMC Emergency Action Plan (EAP) and accident scene management
- Leave No Trace & Conservation
- Diversity, equity, and inclusion (DEI)

Whenever AMC, through its Center for Outdoor Learning and Leadership, develops learning objectives and/or content standards for a particular element of leadership training, sponsoring Club Units must ensure that any leadership training offered will meet those learning objectives and content standards, regardless of the method of instruction. Also, whenever AMC through its Center for Outdoor Learning and Leadership, establishes standards for facilitators delivering elements of leadership training, Club Units must ensure that those elements of leadership training are delivered by facilitators meeting those standards.

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 must 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 and must not conduct any Activity that they know does not meet such requirements.
- Leaders must know and follow all 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.

Participants and Activity Management

- Leaders may not exclude persons from an Activity based on membership status, any protected class, gender identity or expression.
- The participant is required to sign an approved AMC release when participating in an officially sanctioned AMC activity.
- Leaders must notify all participants that there is an element of risk in the Activity using 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.
- Leaders must 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.). Leaders must inform participants 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, during any Activity, an accident or incident occurs that meets any of the following criteria, the Leader must file a Volunteer Incident Report Form as soon as practicable with the sponsoring Club Unit and with the Risk Management Department. Accidents and incidents requiring reporting are as follows:
 - Incident response involves the use of outside agencies (e.g., police, hospital, emergency response, and search and rescue).
 - 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) must 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 their 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 always worn when paddling Activity Leaders or participants are on the water except for flat-water boating Activities. On flat water boating Activities PFDs must be always present for all Leaders and participants in their boat.
 - 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 Activity-appropriate safety equipment reasonably 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 their designee must decide on an appropriate course of action to manage the accident scene.

Guidelines for Leaders

Guidelines are further standards that must be met by all Club Units and Leaders except where it is not possible or in the best interests of Activity participants to do so. Such exceptions may be because of the nature of the Activity or situations arising while the Activity is in progress. Excluding those instances, Leaders must always meet these guidelines to maintain high standards of quality Activity leadership.

Leaders must consider the safety and well-being (both physical and emotional) 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 must 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 must 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 must 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, and
 - Cancellation policies & procedures.
- Leaders must use the AMC Activity Rating System to enable prospective participants to determine whether the Activity is appropriate for them.
- Leaders must communicate the meeting time and location to approved Activity participants with adequate notice.
- Leaders must 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 must encourage participants to inform the Leader of any changes in their ability or willingness to continue with the Activity and try to observe behavior or other factors that might indicate possible issues whether or not participants directly inform the Leader of these issues.
- Leaders must strive to be complete, concise, and clear in all communications to participants.

Participants and Group Management

- Throughout the Activity, Leaders must attempt to facilitate positive group interactions and to make sure that new people are introduced and welcomed into the group.
- 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. Leaders with difficulties or questions regarding this issue, or an individual participant, are encouraged to contact the chair of their sponsoring Activity committee, the chair of their volunteer Club Unit, or the Risk Management Department (603-466-8054).
- Leaders must encourage participant conduct consistent with Leave No Trace environmental and conservation principles and local regulations.
- Leaders must not require anyone to attempt any element of the Activity that is beyond their ability.
- Leaders must encourage respectful behavior by all persons participating in the Activity and be prepared to intervene if they observe or are told of any behavior inconsistent with AMC's Code of Conduct.

Activity Management

- If the Leader is unable to participate, a qualified replacement Leader must 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 must carry appropriate information resources, such as guidebooks, maps, etc. as applicable, including supplemental information resources to be used if the Activity plan must be modified.
- Leaders must designate sufficient assistant Leaders, for duties such as lead, sweep, sub-group leader, or others, to make reasonable efforts to minimize participant risk.
- Leaders must designate only persons as assistant Leaders who have the skills required for the tasks assigned.
- Leaders must 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, Leaders are encouraged to keep the group together.
- There may be times when it is advisable to divide large groups into smaller, independent sub-groups or to 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 the group that the Leader team can manage safely and effectively; impact on the environment; and impact on the other persons' outdoor experience.

Requirements for Activities

The following requirements must be met 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 mission of the organization.
- Activities must be approved by persons designated for that purpose by the sponsoring Club Unit.

All Activities must be approved through the Activities Database (ActDB) by its established approval processes. After an Activity has been approved, it may be announced or publicized to the public as derived from or referencing an approved Activity listed on the Activities Database.

One exception to the trip posting parameters as outlined above:

- 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, of their approved Activities scheduled for that period.

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