

## Rules of the Hiking/Backpacking Committee

*Reflects all H/B Committee decisions through 5/9/2000, plus approved changes since 2010.*

*v2.34, effective 2/12/2019 – Updated leadership requirements for co-lead currency and winter trip eligibility*

*v2.35, effective 1/12/2021 – “Chairman”, “Vice Chairman”: remove gender*

*v2.36, effective 9/20/2022 – Require that a 4-season applicant has led two or more 3-season trips*

### STANDING RULES OF THE HIKING/BACKPACKING COMMITTEE

- 1.1 Name of the Committee:** The Committee shall be known as the “Hiking/Backpacking Committee of the Boston Chapter, Appalachian Mountain Club” (short title: H/B Committee), hereinafter referred to as the Committee.
- 1.2 Responsibilities of the Committee:** The Committee shall be responsible for:
  - 1.2.1 Coordination of Activities: Coordination of official hiking (except local trips) and backpacking activities within the Boston Chapter, AMC;
  - 1.2.2 Training of Leaders: Training and/or approval of all Hiking/Backpacking trip Leaders who engage in trips officially sanctioned by this Committee;
  - 1.2.3 Instructional Programs: Conducting instructional programs relating to hiking and backpacking.
- 1.3 Officers:** The Committee shall consist of a Chair, Vice Chair, secretary, treasurer, trip coordinator, plus sufficient additional members necessary to meet the needs of the Committee as decided by the Committee. The officers shall be elected by the Committee during the December Committee meeting with the following exceptions:
  - 1.3.1 Vice Chair Nomination: The nomination of the Vice Chair shall be made by the new Chair during the January Committee meeting. Said nomination is subject to ratification by the whole Committee.
  - 1.3.2 Vacancies: Vacancies shall be filled as they occur.
- 1.4 Tenure of Officers:** The tenure of office shall be one year, or until the next election of officers.
- 1.5 Members:** Membership on the Committee shall be by written or oral application to the Committee Chair. The Chair shall submit the applicant’s request to the Committee for approval.
- 1.6 Attendance:** Members are expected to attend all meetings. Anyone absent for three consecutive meetings, as determined by the secretary’s records, shall be contacted by the Chair to determine continuing interest in Committee membership.
- 1.7 Meetings:** The Committee shall meet monthly except for June, July, and August, when no monthly meetings need be held. The time, date, and place for the monthly meeting shall be decided by the Committee membership. Extraordinary sessions may be convened at the discretion of the Chair, Vice Chair, or any three bona-fide members of the Committee.

**1.8 Voting: All matters of policy, approval of trip Leaders, election of officers, and expenditure of moneys shall be considered and voted in open scheduled monthly meetings or well-publicized extraordinary meetings. In all cases, a simple majority vote shall prevail. A list of the current Committee membership shall be kept by the secretary and all votes shall require one-third of the Committee to be present and voting in order to be valid. Each member of the Committee shall be permitted one vote except for the presiding officer who shall vote only to break a tie. The Committee is authorized to hold executive sessions only for those matters it deems would create unnecessary embarrassment to persons involved. However, all voting must be in open session and recorded in the Committee minutes.**

**1.9 Duties of the Chair: The duties of the Chair shall be:**

1.9.1 To preside over the monthly and extraordinary meetings;

1.9.2 To create and appoint sub-Committees, as deemed necessary;

1.9.3 To represent, or cause to be represented, the Committee at Boston Chapter required meetings, and on other occasions as required; and

1.9.4 To appoint members to specific responsibilities as required by the Committee.

**1.10 Duties of the Vice Chair: The duties of the Vice Chair shall be to act for, represent, and assist the Chair in the performance of those duties outlined by these standing rules.**

**1.11 Duties of the Treasurer: The duties of the treasurer shall be:**

1.11.1 to monitor the moneys of the Committee;

1.11.2 to receive and disburse moneys as directed by the Committee, and to maintain checking and/or savings accounts for this purpose;

1.11.3 to write the year-end report for submission to the Boston Chapter; and

1.11.4 to render quarterly financial reports to the Committee or as directed by the Committee.

**1.12 Duties of the Secretary: The duties of the secretary shall be:**

1.12.1 to take the official minutes during Committee meetings and publish those minutes to a distribution list as specified by the Committee;

1.12.2 to maintain the non-financial records of the Committee.

1.12.3 to maintain the official Committee and trip Leader rosters; and

**1.13 Duties of the Trip Coordinator: The duties of the trip coordinator shall be:**

1.13.1 to receive;

1.13.2 to screen (according to Committee policy); and

1.13.3 to transmit to the club and chapter publications, the notices of upcoming trips and activities.

**1.14 Trip Leaders: AMC members seeking approval as trip Leaders shall apply to any member of the Committee. The prerequisites for approval as trip Leader shall be as established by the Committee. A simple majority vote by the Committee confers trip Leader status to the applicant and notice of approval shall be made in the official Committee minutes.**

**1.15 Fund Allocation: Allocations over \$200 that are not directly related to programs shall require a majority vote at two consecutive Committee meetings.**

**1.16 Standing Rules:** These standing rules shall be ratified by a simple majority vote at two consecutive Committee meetings, and may be amended by the same procedure.

## **2 FINANCIAL RULES**

**2.1 Scope of the Rules:** The above entitled rules, hereinafter referred to as the “Financial Rules”, set out in this part 2, shall govern the handling and reporting of finances by volunteers who assist the Committee or who are duly appointed by the Committee to be Committee Members, Program, Workshop and Activity Coordinators and Trip Leaders.

**2.2 General Rules:** The following general rules shall be applied to the handling of all Programs, Workshops, Activities or Trips:

- 2.2.1 Fees for Services Prohibited: No Committee Member, Program, Workshop or Activity Coordinator, Leader, Co-Leader or other volunteer for the Committee shall charge or collect, directly or indirectly, a fee for services or work they perform in connection with an activity as a volunteer.
- 2.2.2 Fee Policy: Fees may be charged for attendance at Programs, Workshops, Activities and Trips conducted by the Committee and Trips or Activities conducted by Trip Leaders subject to the specific provisions contained herein.
- 2.2.3 Delegation of Financial Responsibility: The Committee may delegate the authority to handle funds and file Financial Reports to its duly appointed Program and Workshop Coordinators and Leaders. A Program, Workshop Coordinator or Leader may delegate the handling of funds, preparation and filing of Financial Reports to Co-Leader or volunteer only if that person is under the immediate supervision of said Coordinator or Leader or an authorized member of the Committee. Said Coordinator or Leader, in any event, shall be ultimately responsible for the filing of the Financial Report.
- 2.2.4 Refunds: The Program, Workshop or Activity Coordinator or Leader shall clearly inform participants of the refund policy to be applied in connection with an activity if different from the Trip Policy set out in the AMC Outdoors. If a dispute arises over whether a refund shall be made to a participant, the Committee Chair or Treasurer shall immediately be notified thereof. If the matter cannot be resolved by the Committee Chair or Treasurer, it shall be brought to the Committee’s attention at a regular meeting and a course of action decided by the Committee.
- 2.2.5 Advances by the Committee: The Committee may advance funds to a Coordinator or Leader only for the purposes of a Program, Workshop, Activity or Trip conducted by the Committee. The Committee shall not advance funds for Trips or Activities conducted by a Leader, except under the provisions of the Leaders’ Reimbursement Program.
- 2.2.6 Reimbursements by the Committee: The Committee shall reimburse a Program, Workshop or Activity Coordinator or Leader who has advanced personal funds to pay the expenses of a Program, Workshop or Activity conducted by the Committee. The Committee shall not reimburse a Leader who has advanced personal funds to pay for the expenses for a Trip or Activity conducted by the Leader, except under the provisions of the Leaders’ Reimbursement Program.
- 2.2.7 Financial Reports: A financial report as described herein is required to be filed by every Program, Workshop or Activity Coordinator or Leader:
  - 2.2.7.1 where funds are accepted from participants for the right to attend an activity;
  - 2.2.7.2 where advancements are received from the Committee;
  - 2.2.7.3 where reimbursements are requested from the Committee; or
  - 2.2.7.4 as otherwise indicated herein or directed by the Committee.

2.2.8 Surpluses: Any surplus resulting from a Program, Workshop or Activity or Trip conducted by the Committee shall belong to the Committee. Any surplus resulting from a Trip conducted by a Trip Leader shall either be returned to the participants or paid over to the Committee. Surpluses shall be used for the operation and purposes of the Committee.

2.2.9 Deficits: Any deficit resulting from a Program, Workshop, Activity or Trip conducted by the Committee shall be the Committee's loss. Any deficit resulting from a Trip conducted by a Trip Leader shall be the Leader's loss. Where a loss has been sustained by a Leader, said Leader may apply to the Committee under the provisions of the Leaders' Reimbursement Program.

**2.3 Programs, Workshops or Other Activities Conducted by the Committee: The following rules are specifically applicable to the finances associated with Programs, Workshops and Activities conducted by the Committee:**

2.3.1 Fee for Programs, Workshops or Activities of the Committee: The Committee may determine and charge a reasonable fee for participants to attend Programs, Workshops or Activities it conducts as follows:

2.3.1.1 Fee Determination: Fees shall be determined by consideration of the following factors:

2.3.1.1.1 the estimated administrative costs of the activity;

2.3.1.1.2 the estimated cost of the rental of any facility for purposes other than food and/or lodging;

2.3.1.1.3 the estimated cost of hiring of any person to provide services for an activity which cannot be provided by volunteers;

2.3.1.1.4 the estimated cost of food and lodging for the participants;

2.3.1.1.5 the estimated cost of food and lodging for the Leaders and Co-Leaders;

2.3.1.1.6 any other estimated necessary expenses of the activity; and

2.3.1.1.7 an amount necessary to cover the operating expenses of the Committee.

2.3.2 Program, Workshop or Activity Coordinator: A Program, Workshop or Activity Coordinator appointed by the Committee to manage a particular Program, Workshop or Activity shall be under the direct supervision and oversight of the Committee and shall be responsible to the Committee for the following:

2.3.2.1 Management of Finances: The Coordinator shall carefully manage any funds advanced by the Committee, received from participants or received from any other source, stay within any budget approved by the Committee and carefully manage expenditures in connection with said Program, Workshop or Activity conducted by the Committee.

2.3.2.2 Financial Reports: The Coordinator shall provide Financial Reports concerning the Program, Workshop or Activity managed in the form provided for herein or as otherwise directed by the Committee. Program Coordinator shall provide the Financial Report for any Workshop or Activity which is conducted as a part of a Program, or in the alternative, delegate the responsibility to the respective Workshop or Activity Coordinator.

**2.4 Trips or Activities Conducted by Leaders: The following rules are specifically applicable to the finances associated with Trips or Activities conducted by Trip Leaders:**

2.4.1 Fees for Trips or Activities Conducted by Leaders: For activities or trips conducted by an approved Trip Leader, the Leader may not charge a fee to participants to attend an activity the Leader conducts, except as follows:

2.4.1.1 No Food or Lodging Provided: For activities where no food or lodging is obtained by the Leader, the following rules shall apply:

2.4.1.1.1 The Leader may charge \$1.00 per participant per weekend to cover only the administrative expenses of the activity.

2.4.1.1.2 The trip notice in this instance shall state that a \$1.00 administrative fee is being charged.

- 2.4.1.1.3 Any surplus, after said deductions, shall be returned by the Leader either to the participants or to the Committee.
- 2.4.1.1.4 The Leader shall maintain financial records of income and expenses for a period of six months, in case questions arise about the finances of the trip.
- 2.4.1.2 Food and Lodging Provided: For activities where food and/or lodging is obtained by a Leader for participants, the following rules shall apply:
  - 2.4.1.2.1 The Leader may charge an amount sufficient to cover administrative costs of the activity.
  - 2.4.1.2.2 The Leader may charge for the cost of the food and/or lodging to be obtained for the participants.
  - 2.4.1.2.3 At the option of the Leader, an additional to cover the food and/or lodging expenses of the Leader and Co-Leader, may be included in the fee charged to the participants.
  - 2.4.1.2.4 Where a lodging facility does not charge for the food and/or lodging of either a Leader or Co-Leader or both, the Leader and Co-Leader may take advantage of this offer in lieu of reimbursement for food and/or lodging.
  - 2.4.1.2.5 Any surplus after said payments and deductions shall be returned by the Leader either to the participants or to the Committee.
  - 2.4.1.2.6 The Leader shall maintain financial records of income and expenses for a period of six months, in case questions arise about the finances of the trip.
- 2.4.1.3 Lodging Owned or Financial Interest in Lodging: Where a Leader uses a lodging facility owned by the Leader or Co-Leader or in which either of them has a financial interest of any kind, direct or indirect, the following rules shall apply:
  - 2.4.1.3.1 A fee for the lodging shall not be charged.
  - 2.4.1.3.2 The Leader shall not charge more than \$10.00 dollars per night per person to cover the added administrative and utility expenses of the trip or activity caused by using the owned facility.
  - 2.4.1.3.3 If food is provided, the Leader shall only charge for the actual cost of the food and shall not charge any fee for services for food preparation.
  - 2.4.1.3.4 The trip notice for such a trip must state the amount of the fee to be charged.
  - 2.4.1.3.5 Any surplus after said reimbursements shall be returned by the Leader either to the participants or to the Committee.
  - 2.4.1.3.6 The Leader shall maintain financial records of income and expenses for a period of six months, in case questions arise about the finances of the trip. Any such financial interest shall be disclosed to the Committee.
- 2.4.1.4 Situations Not Covered by the Rules: Where a trip or activity presents a situation which does not fall into any of the above categories, the Leader shall submit a written request to the Committee before any fee may be charged to participants for such a trip or activity.
- 2.4.2 Trip Leaders: A Trip Leader's financial practices in managing a trip or activity are generally not under the direct supervision and oversight of the Committee, but those practices are subject to review by the Committee as follows:
  - 2.4.2.1 Management of Finances: The Trip Leader shall carefully manage any funds advanced by the Committee, received from participants or received from any other source and carefully manage expenditures in connection with a Trip or Activity led. This includes keeping (for a period of six months) records of the income and expenses associated with the trip. No report needs to be filed.

- 2.4.3 Situations Creating Actual or Perceived Financial Advantage or Conflict: Program, Workshop, Activity Coordinators and Leaders shall not submit, and the Trip Coordinator shall not accept for publication in the AMC Outdoors or Charles River MUD or other publication of the Committee, notices of an activity or trip which shall create actual or perceived financial advantage to any commercial lodging facility or privately owned non-commercial lodging facility or any actual or perceived conflict of interest, as set out in the following rules:
- 2.4.3.1 Naming Accommodations in Trip Notices: A notice of an activity or trip which states the “trade or business name” of a commercial lodging facility or any “specific identifying name” of a privately owned non-commercial facility other than an AMC facility or facility operated by a non-profit organization, shall be construed to provide an actual or perceived financial advantage and a conflict.
  - 2.4.3.2 General Description Permitted: Generalized descriptions of lodging facilities by type, e.g., “bed and breakfast”, “inn”, “motel”, “hotel”, “hostel”, “campground”, “house,” “cabin” or “lodge”, or by location, e.g., “N. Conway”, “Conway”, are permitted.
  - 2.4.3.3 Names of AMC or Non-profit Facilities Permitted: Using the names of an AMC facility or a facility of a non-profit organization in Trip Notices is permissible since no financial conflict or advantage results.
  - 2.4.3.4 Informing Potential Participants of Accommodations: When a potential participant in a trip or activity inquires about the activity, it is permissible for the Leader or Co-Leader to disclose any name of the lodging facility.
- 2.5 Financial Reports: Programs, Workshop or Activity Coordinators and Trip or Activity Leaders shall comply with the following rules for preparing Financial Reports:**
- 2.5.1 Content of a Financial Report: Where a financial report is required under the rules set out herein, it shall include the following information:
    - 2.5.1.1 name, address, and telephone number of the Program, Workshop, Activity Coordinator or Leader making the report;
    - 2.5.1.2 number of participants;
    - 2.5.1.3 fee collected from each person;
    - 2.5.1.4 total fees collected;
    - 2.5.1.5 total refunds made;
    - 2.5.1.6 cost of food, lodging and administrative expenses;
    - 2.5.1.7 name and location of the lodging facility used;
    - 2.5.1.8 indication of whether there was a waiver of lodging fee to the Leader and/or Co-Leader by the facility;
    - 2.5.1.9 indication of whether the Leader and/or Co-Leader owns or has a financial interest in the lodging facility used;
    - 2.5.1.10 amount of any surplus or any deficit;
    - 2.5.1.11 indication of what if anything was refunded to the participants;
    - 2.5.1.12 date of the report and signature of the Coordinator or Leader making the report,
    - 2.5.1.13 attached receipts; and if applicable
    - 2.5.1.14 attached check for surplus funds.
  - 2.5.2 Lost or Unavailable Receipts: Where an original receipt is lost or unavailable, a dated and signed statement of the Coordinator, Leader or Co-Leader containing a brief explanation and the cost or estimated cost of each item, shall serve as an adequate substitute receipt, subject however to review and approval by the Treasurer.

- 2.5.3 Reporting Surpluses: If a surplus is reported and is not returned to Participants by the Program, Workshop or Activity Coordinator or Leader of an Activity or Trip, the following rules apply:
  - 2.5.3.1 A check representing the surplus made payable to the Hiking and Backpacking Committee shall be forwarded to the Committee Treasurer.
- 2.5.4 Reporting Deficits: If a deficit is reported by a Program, Workshop or Activity Coordinator or Leader of an Activity or Trip, the following rules apply:
  - 2.5.4.1 Committee Conducted Programs, Workshops or Activities: For Programs, Workshops or Activities conducted by the Committee, the Committee shall be responsible for any deficits or losses incurred in the conducting of said Program.
  - 2.5.4.2 Leader Conducted Trips and Activities: Since it is expected that all trips or activities run by Leaders will be run on a financially sound basis, the Leader and Co-Leader are completely responsible for any deficit or losses sustained for a trip conducted by the Leader. The Committee will generally not accept any responsibility for deficits or losses incurred by a Leader and Co-Leaders.
    - 2.5.4.2.1 Leaders' Reimbursement Program: In certain situations, a Leader or Co-Leader may apply to the Committee for reimbursement of losses incurred pursuant to the provisions of the Leaders' Reimbursement Program (an experimental program) (see Part 2.6); however, the Committee does not represent or guarantee that such deficit or loss will be reimbursed merely because such request is made or considered by the Committee.
- 2.5.5 Disclosure of Financial Interest: Coordinators, Leaders and Co-Leaders who own a lodging facility, whether commercial or private in nature, or who have any direct or indirect financial interest therein shall disclose said interest in the financial report, when said lodging facility is used for a Program, Workshop, Activity or Trip.
- 2.5.6 Interim Financial Reports: The Committee may require a Program, Workshop or Activity Coordinator to prepare an interim Financial Report for the Program, Workshop or Activity.
- 2.5.7 Time Limits for Submission of Financial Reports: All Financial Reports shall be submitted to the Treasurer within the following time limits:
  - 2.5.7.1 Coordinators: In the case of Program, Workshop or Activity Coordinators, within one month of the completion of the last activity associated therewith;
  - 2.5.7.2 Other Time Limits: In all cases, such other time limits as the Committee may specify.
    - 2.5.7.2.1 Extensions: A two week extension may be granted by the Treasurer upon request of the person required to report. For any additional extension of time, the person required to report must forward a written request for an extension to the Committee.
- 2.5.8 Unsatisfactory Reports: If the Treasurer is not satisfied with a Financial Report or requires additional information, the Treasurer shall:
  - 2.5.8.1 Notice To Correct Unsatisfactory Report: Notify the Coordinator or Leader that additional information is required and set a time limit for submission of same.
  - 2.5.8.2 Failure to Correct Unsatisfactory Report: If a Coordinator or Leader does not comply with the request of the Treasurer for additional information within a reasonable time, the Treasurer shall bring the matter before the Committee for discussion and possible action.

## **2.6 Leaders' Reimbursement Program (An Experimental Program)**

- 2.6.1 Introduction: : Some trips require the use of overnight lodging facilities. However more and more lodging facilities now require either a substantial deposit or payment in full in order to reserve space. (Even AMC facilities such as the Crawford Hostel, a commonly used establishment for trips, now requires full prepayment) For approved Leaders (hereinafter Leader(s)) of the Hiking and Backpacking Committee (hereinafter the Committee) where notice of the trip must be submitted at least two months prior to publication of the AMC Outdoors, space must often be reserved before the Leader is assured that the trip will fill. Thus, for those Leaders who are willing to make the initial financial outlay from personal funds, there is no guarantee that they will not suffer a personal financial loss if the trip does not fill. As a result, Leaders are limited in the type and variety of trips they would otherwise be willing to organize and lead due to this kind of financial exposure. The Leaders' Reimbursement Program, therefore, is designed to protect Leaders from reasonable financial risk as a result of their efforts to bring the AMC public a wider and more varied selection of hiking/backpacking trips.
- 2.6.2 Reimbursement Rationale: : Leaders would be assured that the Committee would reimburse them for pre-paid lodging facilities that are not recoverable when, for reasons beyond the Leader's control, a duly authorized and submitted (i.e. AMC Outdoors or Mud) trip does not fill. "Lodging" may be defined and restricted by the Committee, but would likely include: AMC facilities, reasonably priced inns or B&Bs, campgrounds/shelter fees, etc.
- 2.6.3 Reimbursement Procedures: To determine what expenses may be eligible for reimbursement by the Committee, the following procedures and/or restrictions would apply:
- 2.6.3.1 Reimbursable Expenses: : Potentially reimbursable expenses should be those initially paid by the trip Leader(s) or those paid back to the Committee when it has advanced funds to the Leader(s).
- 2.6.3.2 Application for Reimbursement: : In order to be reimbursed, written application to the Committee would be required after the completion of the trip. The following information should be provided:
- 2.6.3.2.1 Date and location of the trip, including the name of the lodging facility in question
- 2.6.3.2.2 The amount being requested for reimbursement
- 2.6.3.2.3 Per person cost of the facility
- 2.6.3.2.4 Receipt(s) for payment to the lodging facility made by the trip Leader.
- 2.6.3.3 Limitations on Reimbursement: The Leaders' Reimbursement Program is not designed to replace the Leader's responsibility for taking all reasonable steps necessary to fill the trip. Therefore, in the event the Leader is reimbursed for a particular trip, that particular Leader would not be eligible to apply for reimbursement for and subsequent trips for a period of six months.
- 2.6.4 Advancement Procedures: Leaders may apply for the advancement of funds from the Committee in order to secure a deposit for lodging needed to run a trip (See Leaders' Reimbursement Program to define lodging). The following procedures and/or restrictions would apply:
- 2.6.4.1 Request for Advancement: A written request must be submitted to the Committee Treasurer. This request should include the names of the trip Leaders and Co-Leaders, date and location of the trip, name of lodging, per person cost of lodging, and the amount needed to secure a deposit for participating trip members.
- 2.6.4.1.1 Each request may be an advancement of funds up to but not exceeding \$200. Upon making the request and if approved, the Leader(s) shall be advised that they must reimburse the Committee for these funds either within two months of receipt of the check or by the date of the first day of the trip, whichever comes first.
- 2.6.4.1.2 Requests should be presented to the Committee by the Treasurer for review and approval or denial. The Committee shall not approve requests exceeding the total amount of \$1,000 per month.
- 2.6.4.2 Limitations on Advancements: A Leader may apply for the advancement of funds no more than twice a year. This is extended to a Leader who served on a trip with another Leader where the other Leader applied for and received the advancement of funds from the Committee.



2.6.4.3 Denial of Advancement: The Committee reserves the right to deny requests at any time.

2.6.4.4 Payment: The check shall be made out to the particular facility which the Leader has chosen.

2.6.5 Summary: The Leaders' Reimbursement Program is an experimental program subject to the financial resources of the Committee. As such, it may be terminated at any time. However, its purpose is to allow Leaders to offer more varied kinds of trips to the hiking public. Its success or failure will depend upon the continued good judgment of Leaders.

### **3 LEADERSHIP RULES**

**3.1 Preamble: A primary purpose of the Hiking/Backpacking Committee is the development of experienced, competent leaders for the conduct of safe, enjoyable outdoor activities. With this purpose in mind, the committee has established the requirements listed below for certification of co-leaders as three- and four-season leaders. While satisfaction of these requirements is sufficient for approval as a three- or four-season leader, it is the committee's hope that everyone will recognize that they are minimum requirements and that the development of outdoor leadership skills is an ongoing process. The committee strongly urges all leaders and co-leaders to improve their leadership skills continually, whether informally through self-education or formally through programs offered by the AMC or others. Foremost among the recommended additional skills are wilderness first aid and knowledge of how to use map and compass. It is the preference and expectation of the committee that individuals seeking to become leaders will comply with the requirements for three- and four-season leadership in a logical progression that allows them cumulatively to acquire the experience and knowledge needed for sound leadership. The committee strongly prefers that co-leads offered in support of an application for three-season leadership have taken place during the spring, summer, and fall seasons to acquaint the applicant with the unique factors affecting the conduct of trips during these seasons. The Committee also strongly prefers that applicants for certification as four-season leaders have led one or more three-season trips to insure familiarity with the responsibilities of leading a trip as distinguished from co-leading one. As always, the safety of participants, the ability to plan and execute trips, and outdoors skills and competence are the touchstones of decision when evaluating leadership applications.**

**This preamble and the rules that follow shall govern all matters concerning leadership status with the Hiking/Backpacking Committee and the authority of the committee's leaders and co-leaders.**

**3.2 Scope of the Rules: The above entitled rules, hereinafter referred to as the "Leadership Rules", set out in this part 3, shall govern all matters of the Leadership.**

**3.3 Committee's Role in Establishing Leadership Rules: The Committee shall establish**

- 3.3.1 categories of Leadership to meet its purposes;
- 3.3.2 the prerequisites for applying for Leadership status;
- 3.3.3 the procedure for applying for Leadership and discontinuing it;
- 3.3.4 rules governing the authority of Leaders and Co-Leaders; and
- 3.3.5 rules related to a Leaders List.

**3.4 Categories of Leaders: The following categories of Leaders and the prerequisites for each category are as follows:**

- 3.4.1 Requirements necessary for all categories of leadership:
  - 3.4.1.1 The applicant must be an AMC member in good standing.

- 3.4.1.2 The applicant's overall level of hiking/backpacking experience is deemed by the Committee to have presented the applicant with a sufficient breadth of challenges and contingencies to be prepared to lead the types of trips desired in a safe and fun manner.
- 3.4.1.3 As detailed for each level of leadership, the applicant needs to have co-led a number of H/B trips in order to practice and demonstrate H/B-compatible skills in trip planning, posting, screening, technical hiking/backpacking skills, field leadership, and reporting.
  - 3.4.1.3.1 At least 3 of the applicant's co-leads must be done under the supervision of different H/B leaders.
  - 3.4.1.3.2 At least 2 of the applicant's co-leads must take place within the 12 months prior to the application date.
  - 3.4.1.3.3 Because of the limited potential for planning, posting and screening, no more than one co-led program trip can count.
  - 3.4.1.3.4 Based on the candidate's level of past experience, the committee may reduce the number of required co-leads to as few as 1.
- 3.4.1.4 The applicant must demonstrate to the satisfaction of the Committee that he or she understands the limits of his or her individual abilities and experience, and will not attempt to lead trips beyond those limits.
- 3.4.2 Requirements specific to three season leadership status:
  - 3.4.2.1 The applicant shall have completed a leadership training course approved by the Committee or demonstrate experience which the Committee deems to be equivalent.
  - 3.4.2.2 The applicant is in compliance with the Committee's Wilderness First Aid requirements at the time of application.
  - 3.4.2.3 The applicant must have co-led at least 4 trips, each under the direct supervision of an active H/B leader, at least 2 of the co-leads must be organized and run as 3-season trips, and 3-season conditions must be in effect on those trips.
- 3.4.3 Requirements specific to four season leadership status:
  - 3.4.3.1 The applicant must be a fully active H/B 3-season leader and have demonstrated experience showing their capability and competence as a 3-season leader:
    - 3.4.3.1.1 The applicant may satisfy the above by having i) led at least 2 trips as a 3-season leader or ii) be able to demonstrate experience which the Committee deems to be equivalent to leading trips with the capability and competence required of a 3-season leader.
  - 3.4.3.2 The applicant must have conducted at least 5 total co-leads, each under the direct supervision of an active 4-season H/B leader:
    - 3.4.3.2.1 All co-leads must be organized and run as winter trips where winter conditions are expected and are in effect on each co-led trip.
    - 3.4.3.2.2 At least one co-led trip must be materially above tree line.
- 3.4.4 Wilderness First Aid Requirement:
  - 3.4.4.1 In order to achieve active leader status, an individual must have successfully completed an approved Wilderness First Aid course prior to but no earlier than three years before the leadership application.
  - 3.4.4.2 In order to maintain active leadership status, an individual must successfully complete an approved Wilderness First Aid course by December 31st of the third year following the date of the leader's last course, except that an individual who has successfully completed an approved Wilderness First Aid course at least twice (and at least one time while an active leader) must successfully complete an approved Wilderness First Aid course by December 31st of the fifth year following the date of the leader's last course.

3.4.4.3 The Committee may from time to time determine which courses qualify to meet this requirement. Such determinations do not constitute or require a Rules change. As of Spring 2014, approved courses include Wilderness First Aid or Advanced Wilderness First Aid or Wilderness First Responder courses taught by Stonehearth Open Learning Opportunities (SOLO), Wilderness Medical Associates, National Outdoors Leadership School (NOLS), and the H/B Committee.

3.4.5 Co-Leadership Status: The prerequisites for status as a co-leader are as follows:

3.4.5.1 A person may serve as a co-leader of a hike at the request of an approved four- or three-season Leader.

3.4.5.2 A person who has completed a Leadership Training Course may request to be placed on the Leaders List as a co-leader to inform leaders of availability to assist with hiking trips or other activities.

3.4.5.3 Recommended Skills: There are skills which are recommended and which are viewed as a positive factor in assessing a Leadership application, including but not limited to, the following:

3.4.5.3.1 Knowledge of how to use map and compass;

3.4.5.3.2 Formal training in wilderness hiking and camping skills.

**3.5 Review of an Application for Leadership: The application shall be reviewed by the Committee in the following manner:**

3.5.1 As soon as practicable after the application is received;

3.5.2 At a regular or special meeting of the Committee;

3.5.3 Without the applicant being present;

3.5.4 With attention given to each prerequisite established for the category of leadership sought;

3.5.4.1 With attention given to the opinion of each Leader referenced in the application. If a referenced Leader cannot be reached or does not recall the Applicant's performance on a trip, the Committee may rely on fewer Leaders than are referenced.

3.5.4.2 After review:

3.5.4.2.1 If there is a lack of necessary information, the Committee may defer any action on an application until such information is obtained. The Committee may request the Chair or another member to contact the applicant for additional information or to make suggestions for addenda to the application;

3.5.4.2.2 If the Committee votes to approve an applicant as a Leader, approval shall be noted in the minutes, a copy of the minutes shall be forwarded by the Secretary to the newly approved Leader and the change of status shall be noted in the Leaders List or the new leader shall be added to the Leaders List.

3.5.4.2.3 If the Committee votes not to approve an applicant, such action shall be noted in the minutes and the Committee may request the Chair or other member to contact the applicant about the action taken.

**3.6 Discontinuance of Leadership Status: A person's leadership status, inclusion on the Leaders List and privilege to lead shall be discontinued under any of the following circumstances:**

3.6.1 If a Leader voluntarily requests discontinuance of leadership status.

3.6.2 If a Leader or Co-leader has not led a hike for two calendar years.

3.6.3 If a leader is not an AMC member by virtue of non-payment of dues or otherwise.

3.6.4 By vote of the Committee to enforce its rules or, in the unfettered opinion of the Committee, for the safety of the membership.

**3.7 Reinstatement of Former Leaders: The prerequisites for reinstatement of a leader are as follows:**

- 3.7.1 The applicant shall be a current member of the Appalachian Mountain Club;
- 3.7.2 The applicant must have been in good standing as a leader at the time of removal from the Leaders List and placed on inactive status; (Reinstatement of a leader who was removed from the Leaders List due to a violation of the rules or for misfeasance or malfeasance as a Leader is dealt with elsewhere);
- 3.7.3 The applicant must demonstrate continuing competence in leadership, three- or four-season hiking and camping skills, as appropriate, to the satisfaction of the Committee.
- 3.7.4 The applicant shall be compliant with the Committee's Wilderness First Aid requirement.

**3.8 Rules Governing the Authority of Leaders: The following general rules shall apply to the handling of all hikes or activities by leaders and co-leaders:**

- 3.8.1 Authority to Lead Hikes: The following persons are authorized to lead hikes or assist with hikes:
- 3.8.2 Leaders: A duly approved leader is the only person authorized to conduct a hike or activities listed under Hiking/Backpacking Committee activities;
- 3.8.3 Co-Leaders: A co-leader may lead a hike only when a supervising leader is present on the hike, except as follows:
  - 3.8.3.1 If a leader of a hike or backpack is injured in the field and can't continue in the leadership role, the co-leader may take over leadership to help the leader and the hiking group return to the trailhead safely, or until rescue personnel take over leadership of the hiking group.
  - 3.8.3.2 A co-leader may escort a hiker who must return to the trailhead due to illness, fatigue, injury or for any other reason, where practicable and safe to do so.
- 3.8.4 Missing Leader: In the event a Leader for any reason with or without notice fails to appear for a planned hike, the Co-Leader shall terminate the hike and not lead it.
- 3.8.5 Abuse of Authority: Leaders and co-leaders shall not abuse their authority by violating the rules of the Committee or rules of club facilities they use, or by engaging in reckless unsafe behavior, or by violating the Code of Conduct and Policies on Sexual Harassment and Conflict of Interest set forth by the Appalachian Mountain Club, or by failing to comply with the Leadership Requirements and Guidelines issued by the Outdoor Leadership Development Committee of the Appalachian Mountain Club.

**3.9 Leaders List: The Committee shall maintain a list of approved leaders for the purpose of facilitating communication between the Committee and its leaders and co-leaders**

- 3.9.1 The List shall contain the name, address and telephone numbers of each leader.
- 3.9.2 The List shall also contain the name, address and telephone numbers of each person who has requested to be listed thereon as a co-leader.
- 3.9.3 The list shall indicate whether the person is a four-season leader, a three-season leader or a co-leader.
- 3.9.4 The List may contain such other information that the Committee determines is appropriate.
- 3.9.5 The List is intended only for the use of the Committee and its leaders and co-leaders and any commercial use of the Leaders List is strictly prohibited and any leader or co-leader violating this provision is subject to the provisions pertaining to violation of the rules.
- 3.9.6 The List shall be updated regularly and mailed periodically to all Leaders and Co-Leaders listed.

**3.10 Incorporation of Appalachian Mountain Club Rules, Etc. The following rules, etc., issued by the Appalachian Mountain Club or one of its sub-units, are hereby incorporated into the H/B leadership rules by reference and govern the conduct of leaders and co-leaders equally with H/B's leadership rules.**

- 3.10.1 The Code of Conduct and Policies on Sexual Harassment and Conflict of Interest issued by the Appalachian Mountain Club on \_\_\_\_, 1997;
- 3.10.2 The Leadership Requirements and Guidelines issued by the Outdoor Leadership Development Committee of the Appalachian Mountain Club on October 26, 1996.

#### **4 TRIP COORDINATION RULES**

##### **4.1 Coordination: The following rules shall govern the coordination of the publication in AMC publications of notices of programs, workshops, trips, hikes and activities.**

- 4.1.1 Trip Coordinator: Coordinators of Program and Workshops and Leaders and Co-Leaders hiking trips and other activities shall only submit Notice for publication in AMC publications through the Trip Coordinator; Direct submission of Notices to publications is expressly prohibited.
- 4.1.2 Notices Proper: Each notice shall be of a length and in a form prescribed by the Trip Coordinator and contain the following basic information:
  - 4.1.2.1 Date of the trip;
  - 4.1.2.2 Trip rating;
  - 4.1.2.3 Description of trip;
  - 4.1.2.4 Cost of trip;
  - 4.1.2.5 Name of the Leader and Co-Leader;
  - 4.1.2.6 Telephone number of Leader or Co-Leader.
- 4.1.3 Notices Improper: . A Notice is not in proper form for publication, if it is:
  - 4.1.3.1 not submitted by an approved Leader;
  - 4.1.3.2 submitted by a Co-Leader without an approved Leader being listed on it;
  - 4.1.3.3 outside the type of trip the Leader is approved to lead, e.g. a three season Leader attempting to lead a calendar winter hike;
  - 4.1.3.4 lacking in the basic information required for a proper Notice; or
  - 4.1.3.5 in violation of the rules of the Committee.

#### **5 ENFORCEMENT OF THE RULES OF THE COMMITTEE**

- 5.1 **Action Taken for Violation of Rules: The Committee shall investigate any failure by a Coordinator, Leader or Co-Leader to comply with its Financial or Leadership Rules and shall take any action, with or without notice, by vote at any regular or special meeting, which it deems appropriate, including but not limited to, the following:**
  - 5.1.1 Temporarily or permanently prohibiting the party from coordinating in any program or workshop or leading any hike, activity, or trip of any kind under the Committee sponsorship;
  - 5.1.2 Discontinue leadership or co-leadership privileges and remove the party from the Leaders' List;
  - 5.1.3 Place limitations upon leadership privileges; or
  - 5.1.4 Take any action it deems appropriate under the circumstances to enforce the Rules.
- 5.2 **Right to Reject Trip Notices: When a Notice submitted by a Coordinator of a Program or Workshop or Leader or Co-Leader of a trip, hike or activity does not appear to comply with a rule of the Committee, the Trip Coordinator shall:**

- 5.2.1 Withhold the Notice from publication, notify the Leader and Co-Leader submitting the notice that it does not comply with the rules and request them to resubmit same in compliance.
- 5.2.1.1 If the party then submits a Notice in compliance, the Trip Coordinator may forward same for publication;
- 5.2.1.2 If the party does not submit a Notice in compliance, the Trip Coordinator may continue to withhold same from publication and bring the matter to the attention of the Committee at the next regular or special meeting of the Committee and the Committee shall take such action as it deems appropriate.
- 5.2.1.3 If the circumstances of the activity change or if the Trip Coordinator becomes aware of additional pertinent information that disqualifies publication of the activity, the Trip Coordinator may rescreen the activity and rescind publication until such time as it is determined that the activity has been brought into compliance. The Trip Coordinator is expressly not required to continuously review all previously screened activities to monitor compliance, but is authorized to act when and if a change in circumstances or additional information comes to light that warrants a review of the activity.
- 5.3 Finality of Enforcement, Reconsideration: Action by the Committee shall be final and without further recourse, except that the following procedure is available:**
- 5.3.1 Review Procedure: At any time, a Coordinator or Leader or Co-Leader affected by an action of the Committee taken to enforce its Rules may forward to the Committee a written request for reconsideration of the action, including a discontinuation of leadership status. The Committee shall reconsider the matter at its next regularly scheduled meeting and may in its sole discretion grant the party a hearing. Thereafter, the Committee may affirm, modify or rescind its original action.

## **6 DEFINITIONS:**

- 6.1 **About Definitions: The following are general definitions of terms used in the above rules. Where any dispute arises over the meaning of a term, the Committee interpretation shall govern.**
- 6.2 **Administrative expenses are the costs of telephone calls, faxes, paper, envelopes, postage and photocopies in connection with any activity. These expenses are generally reimbursable from fees collected as set out in the rules.**
- 6.3 **Activities is a broad term which may include programs, workshops, hiking trips, slide shows, socials, etc. They may be conducted by the Committee or delegated to Program, Workshop Activity Coordinators or Leaders approved by the Committee, depending on context.**
- 6.4 **Co-Leader is a volunteer who helps a Leader run a trip or activity. A Co-Leader shall not submit trip notices to the Trip Coordinator, lead activities or Trips, handle funds, and file Financial Reports except when doing so under the direct supervision of a approved Leader.**
- 6.5 **Coordinators are volunteers appointed by the Committee to have overall charge of organizing and conducting a Program or Workshop or Activity and are under the direct supervision and control of the Committee.**
- 6.6 **Financial Report is a report containing detailed information about the finances of a Program, Workshop, Activity or Trip required by these rules. Interim and final reports are included.**
- 6.7 **Financial Interest in Lodging is an actual monetary benefit or a situation which creates the impression of a monetary benefit, not expressly exempted by these rules, by a Coordinator, Leader or Co-Leader derived from accommodations owned by a Coordinator, Leader or Co-Leader or from accommodations owned by another person.**

- 6.8** Food expenses are the cost of food purchased by the Coordinator, Leader or Co-Leader for any activity. Food provided and prepared by the lodging facility staff are considered a lodging expense.
- 6.9** Leader is a volunteer who has been approved by the Committee and granted the authority to submit trip and activity notices to the Trip Coordinator for publication in the on-line Activity Database (ActDB) or successor thereto, and to lead hiking trips or activities, primarily day hiking and camping trips. 4-Season (winter) Leaders may lead hiking and camping trips in the winter as well in the spring, summer and fall. 3-Season Leaders may lead trips in the spring, summer and fall but not in calendar winter or when winter conditions are in effect.
- 6.10** Leader List is the official roster of approved Committee Leaders and contains their names, addresses and telephone numbers. The list also contains the names, addresses and telephone numbers of persons requesting the opportunity to Co-lead with approved Leaders. The list may contain other information.
- 6.11** Leadership Instruction is a course of instruction usually sponsored by a Chapter of the Appalachian Mountain Club or any other organization. If the applicant has taken a Leadership course from an organization other than the AMC, the applicant shall submit a copy of the curriculum of the program with the application. If same is not available, a detailed description of the course may be substituted.
- 6.12** Lodging refers to commercial overnight accommodations or privately owned non-commercial accommodations.
- 6.13** Lodging expenses are the costs of accommodations obtained for an overnight stay and of food provided and prepared by the lodging staff. As applied to a Leader or Co-Leader, the term refers to accommodations of no greater quality or expense than those reserved for the participants.
- 6.14** Notice of Trip or Activity is a notice which describes an activity or a trip and invites participants to take part and which is submitted to the Trip Coordinator via the AMC Activity Database (or successor mechanism thereof) for publication by the AMC or one of the Committees of the AMC for distribution to members and others.
- 6.15** Participants are persons who attend activities. They may or may not pay a fee to attend but they are not volunteers assisting with said activities and may or may not be AMC members.
- 6.16** Program usually refers to a multiple function event controlled by the Committee and may include classroom instruction and "in the field" Workshops. A Program Coordinator is appointed to organize and conduct the event and select Workshop Coordinators or Leaders to assist.
- 6.17** Travel Expenses are the costs of rental, mileage, fuel, wear and tear, depreciation of an automobile or the cost of a bus, train, or other mode of transportation. The cost of travel is not reimbursable to the Program, Workshop or Activity Coordinator or the Leader or Co-Leader of an activity out of the fee for an activity, unless specifically authorized by vote of the Committee.
- 6.18** Utilities are costs of heat, electricity, water etc.
- 6.19** Volunteers are persons who work on the Committee's activities. The only volunteers authorized to handle funds without direct supervision are Committee members, Program, Workshop and Activity Coordinators and Leaders.

- 6.20 Workshops usually refer to a single function event controlled by the Committee. It also may be associated with a multiple event Program. The Coordinator may be appointed either by the Committee or a Program Coordinator.**
- 6.21 Winter Conditions will be in effect during calendar winter and whenever, in the judgment of the Trip Coordinator or at the time of the trip, there is a reasonable expectation that conditions (such as cold temperatures, wind, snow, ice, sleet or freezing rain) will be comparable to those typically experienced during calendar winter. Winter conditions will be in effect whenever snowshoes or crampons are required. Winter conditions will not apply to trips conducted east of (within) Route 495 or east of the Cape Cod Canal.**