



**ADVENTURE TRAVEL**  
VOLUNTEER-LED EXCURSIONS WORLDWIDE

# LEADER HANDBOOK

Revised February 2019

# Updates – Handbook Revisions Overview

## Updates

---

Page 58 – updated information on international wire transfers

Page 63 – documentation of cash disbursements

# TABLE OF CONTENTS

## Introduction

<i>What is an AMC Adventure Travel trip?</i> .....	7
<i>The Handbook</i> .....	7
<i>AMC Adventure Travel Committee</i> .....	8

## Chapter 1: Leader Qualifications

<i>Co-Leader Requirements</i> .....	9
<i>How to Apply to be a Co-Leader</i> .....	10
<i>Leader Requirements</i> .....	11
<i>How to Apply for Leader Status</i> .....	11
<i>Co-leader Traineeship Program</i> .....	11
<i>First Aid Certification Requirements</i> .....	12
<i>AMC Adventure Travel Leader and Co-Leader First Aid Certifications and Maintenance</i> .....	12
<i>AMC Adventure Travel Family Leader and Co-Leader Requirements and Maintenance</i> .....	12
<i>Resources</i> .....	13
<i>AMC Adventure Travel Leader Compensation and Conflicts of Interest</i> .....	13

## Chapter 2: Planning a Trip

<i>Overview and Timeline</i> .....	15
<i>Initial Planning and Research, Key Factors to Consider</i> .....	16
<i>Prepare Proposal, Prospectus, trip rating and Other Pre-trip Communications</i> .....	21
<i>Reservations, Deposits, and Bank Accounts</i> .....	26
<i>Further Communication with Participants</i> .....	26
<i>Preparing Final Information</i> .....	27
<i>During the Trip</i> .....	29
<i>Post-Trip Follow up</i> .....	30

## Chapter 3: Costing a Trip

<i>Identify Costs</i> .....	31
<i>Estimate/Calculate Costs</i> .....	32
<i>Communication Devices</i> .....	36
<i>Constructing a Trip Budget</i> .....	38
<i>Policy on the Cost of Leaders' Meals</i> .....	38
<i>Policy on Airfare Costs</i> .....	39
<i>Policy on Trip Extensions</i> .....	41
<i>Example Itinerary</i> .....	42

## Chapter 4: Communications

<i>Trip Publicity</i> .....	44
<i>The Trip Prospectus, components and trip rating system</i> .....	45
<i>Application, Medical, and Release Forms; the Letter of Acceptance</i> .....	49
<i>Creating a Wait List</i> .....	51
<i>Correspondence with Participants and Vendors</i> .....	51
<i>Other Trip Information Sheets</i> .....	52
<i>Pre-Trip Get-Together</i> .....	53
<i>Trip Report</i> .....	53

## Chapter 5: Screening of Applicants

<i>Screening of Applicants</i> .....	55
--------------------------------------	----

## **Chapter 6: Dealing with Trip Funds**

---

<i>Bank Accounts.....</i>	<i>57</i>
<i>The Trip Deposits.....</i>	<i>59</i>
<i>The Trip Prospectus.....</i>	<i>60</i>
<i>Cancellations .....</i>	<i>61</i>
<i>Trip Operations.....</i>	<i>62</i>
<i>Legitimate Expenses.....</i>	<i>62</i>
<i>Exclusions from the AMC-AT Program Expense Fee.....</i>	<i>63</i>
<i>Submitting the Final Revenue and Expense Report .....</i>	<i>63</i>
<i>Expense Categories.....</i>	<i>65</i>
<i>Foreign or Multiple Currencies.....</i>	<i>66</i>
<i>Submitting Your Report and Refunds.....</i>	<i>67</i>
<i>Reimbursement of Leader Expenses for Cancelled Trips .....</i>	<i>68</i>
<i>Auditing.....</i>	<i>69</i>

## **Chapter 7: Risk Management, Liability and Insurance**

---

<i>Preparation and Risk Prevention.....</i>	<i>70</i>
<i>Accidents, Incidents, and Emergency Response.....</i>	<i>71</i>
<i>Liability and Insurance Coverage - general .....</i>	<i>72</i>
<i>Automotive Insurance.....</i>	<i>76</i>
<i>Motor Vehicle Driving Policy and Record Checking .....</i>	<i>78</i>

## **Chapter 8: Hiking, Backcountry and Camping Trips**

---

<i>Prior to the Trip.....</i>	<i>81</i>
<i>At the Trailhead .....</i>	<i>82</i>
<i>On the Trail.....</i>	<i>82</i>
<i>In Camp.....</i>	<i>83</i>
<i>Sign in/Sign out Policy.....</i>	<i>84</i>
<i>Leave No Trace.....</i>	<i>84</i>

## **Chapter 9: Evaluating AMC Adventure Travel Trips**

---

<i>Investigation of Reported Problems.....</i>	<i>87</i>
<i>Interpreting Trip Evaluation Surveys.....</i>	<i>88</i>

# APPENDICES

- Appendix A:** [AMC Leadership Requirements and Guidelines](#)  
**Appendix B:** [Application to Become an AMC Adventure Travel Leader or Co-Leader](#)  
**Appendix C:** [AMC Adventure Travel Trip Proposal Form](#)  
**Appendix D:** [Questions for Travel Companies](#)  
**Appendix E:** [Trip Budgeting Form](#)  
    **Appendix E1:** [Example, Big Bend, Feb 17](#)  
    **Appendix E2:** [Example, New Zealand, Feb 17](#)  
    **Appendix E3:** [Example, Mont Blanc, Jul 17](#)  
**Appendix G:** [Sample Acceptance Letter and Trip Insurance Information](#)  
**Appendix I:** [Expense Record Keeping Sample](#)  
**Appendix J:** [Checks Received and Deposited Form](#)  
**Appendix K:** [Evacuation Insurance Roster Form \(Roster of Insured\)](#)  
**Appendix L:** [Participant Medical Form](#)  
    **Appendix L1** [Supplemental Medical Form](#)  
**Appendix M:** [Participant Release Form](#)  
**Appendix N:** [Incident Report Form](#)  
**Appendix P:** [Financial Reporting Guidelines](#)  
**Appendix Q:** [Final Revenue and Expense Report Form](#)  
**Appendix S1:** [Vehicle Driving Policy and Authorization Form](#)  
**Appendix S2:** [Driver Check List](#)  
**Appendix T:** [Standard Trip Prospectus Language](#)  
**Appendix U:** [Standard Prospectus Components](#)  
**Appendix V:** [Trip Rating System](#)  
**Appendix W:** [Sign in/Sign out Policy and Form](#)  
**Appendix X:** [Standard First Aid Kit Lists](#)  
    **Appendix X1:** [Participant First Aid Kit List](#)  
**Appendix Y:** [Advertising Template](#)  
**Appendix Z:** [Wire Transfer Request Form](#)
- 

Printable versions of these documents and forms and, in some cases Excel worksheets, are available on the AMC Adventure Travel Leader website:

<https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite/Handbook%20and%20Appendix/Forms/AllItems.aspx>



# Introduction

## **What is an Adventure Travel trip?**

Any volunteer-led AMC trip that is conducted more than 500 miles away from any AMC Chapter and/or is at least 10 days in duration is considered an Adventure Travel trip.<sup>1</sup> Only the Adventure Travel Committee (AMC-ATC), following procedures outlined in this Handbook, may authorize these trips. These trips must relate to AMC's mission and have an emphasis on out-of-doors, active, self-powered activity. Trips should not duplicate those that are generally available from commercial tour operators and travel agencies. The Committee has rejected trips that do not fulfill these requirements.

## **The Handbook**

The AMC Adventure Travel *Leader Handbook* covers those principals of leading an Adventure Travel trip that are needed to offer a safe and enjoyable trip. This Handbook will always be a work in progress, as the learning process for trip leaders and Committee is ongoing. Furthermore, this document is only a tool, and cannot be expected to ever offer enough rules, thoughts, and suggestions to cover every circumstance and assure everyone of a good trip. The AMC-ATC sends out regular newsletters, emails the leader list with updates, and posts new documents on the leader website to supplement this handbook. Adventure Travel leaders must also augment the leader principles in this Handbook with resourcefulness and flexibility in dealing with unforeseen circumstances, and "uncommon" common sense in dealing with the needs of the trip and its participants.

The AMC-ATC, through the interview and evaluation process built into the Adventure Travel trip approval and documentation process, develops a good feel for the leadership styles and abilities of established leaders (those having led one or more successful trips). Understandably, the Committee must be more thorough in dealing with proposals from new leaders. Potential Adventure Travel leaders must have previous leading experience, as it is not the Committee's function to train completely inexperienced leaders, but rather to assist people with documented skills to ready themselves to lead an Adventure Travel trip. At Committee meetings, new leaders are interviewed to confirm their people skills, planning abilities, flexibility and knowledge of the area to be visited. Seasoned leaders, their trip skills confirmed by past performance, are usually asked about particulars of the trip in question, and, therefore, are dealt with more quickly.

This handbook is composed of several Chapters that are updated periodically. The Chapters have been dated to indicate when they have been updated. The complete *Leader Handbook* is mailed only if someone needs a paper copy. The complete and most up-to-date version of the handbook is downloadable from the Adventure Travel Leader website

<https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite>

**All Adventure Travel Leaders should be sure they have the most current handbook pages and should regularly check the AMC Adventure Travel Leader website to ensure the most current forms are being used.**

---

<sup>1</sup> August Camp trips are excluded from this definition.

Previous successful leading experience and knowledge of all material contained in the handbook are absolutely necessary to leading good trips. However, it is also a good idea to attend a few AMC Adventure Travel Committee meetings and to listen carefully to the unrecorded talk about trips and experiences.

For general questions or information regarding AMC Adventure Travel please contact:

Steve Cohen  
Chair, AMC Adventure Travel Committee  
[scohen1234@gmail.com](mailto:scohen1234@gmail.com)  
617-997-6861

OR

Nancy Holland  
Adventure Travel Program Senior Manager  
[nholland@outdoors.org](mailto:nholland@outdoors.org)  
617-391-6587  
10 City Square Boston, MA 02129

**AMC Adventure Travel Committee**

Chair-----	Steve Cohen
Vice-Chair-----	Ron Janowitz
Secretary-----	Karen Thurston Barsanti
Treasurer-----	Mike Barry

**Members:** Mike Barry, Dick Cable, Steve Cohen, Mike Darzi, Sam Jamke, Ron Janowitz, Sue Lach, Pam Madigan, Cindy Martell, Samir Patel, Janis Stahlhut, Dan Stone, Joe Thomas, Karen Thurston Barsanti and, Robert White.

**AMC Staff:** Nancy Holland

**Webmasters:** Bob Goeke and Bob White



# Chapter One

## Leader Qualifications

---

AMC Adventure Travel Leaders facilitate domestic and international trips throughout the year. Experienced AMC volunteer leaders create, plan, and lead each excursion, fostering a dynamic and active group environment. Though each trip is unique, all of them strive to fulfill the AMC's mission of promoting stewardship and appreciation of the natural world. The AMC Adventure Travel Committee (AMC-ATC) is charged with offering trips that are led by well-qualified members. The requirements below help insure that you can provide the best possible experience for participants.

To qualify as a Leader or Co-leader of an AMC Adventure Travel trip, you must document that you have the requisite training and skills. There are several elements to be covered. You must show that you are familiar with the way the AMC leads trips that cover several days or weeks. You must demonstrate that you have had training in specific leadership skills that include organizing a trip, determining whether a participant has the skills needed to go on a specific trip, map reading, first aid certification, and so on. Finally, you must show that you have successfully led groups on trips of a long duration. The required documents are listed below and should be sent to the AMC Adventure Travel Programs Manager, AMC, 10 City Square Boston, MA 02129.

### **Co-leader Requirements**

All AMC Adventure Travel trips must have at least one approved Co-leader. A Co-leader must be qualified and able to completely take over if the leader becomes incapacitated. The minimum qualifications for an AMC Adventure Travel Co-leader are:

- #1 Be a current member of the Appalachian Mountain Club.
- #2 Have taken an AMC sponsored leadership course such as the Club's Mountain Leadership School, or the leadership training courses sponsored by Club Chapters, Camps, or committees.♦
- #3 Have successfully led at least 3 weekend AMC Chapter trips and be recommended in writing by the Chair or Leadership Coordinator of the Chapter or Committee responsible for oversight of these trips.
- #4 Have successfully demonstrated leadership skills by having a significant role in the planning, organizing and executing (including leading daily activities) of a multi-

---

♦ The Adventure Travel Committee may approve waivers of these requirements, at their discretion, based on the potential leader or co-leader's documented previous leadership and training experience.

night AMC Chapter trip. The potential co-leader may choose from one of these two options:

- Lead (not co-lead) one (1) AMC Chapter trip of three (3) or more consecutive nights; **or**
- Lead (not-co-lead) two (2) AMC Chapter trips of two (2) or more nights

The potential co-leader will need to obtain positive participant feedback from the online survey that is arranged by the AMC Adventure Travel Program Manager. ♦

#5 Have the required Wilderness First Aid and CPR certifications listed below for any trip that is proposed.

#6 Have attended the weekend-long, intensive leadership training course offered by the AMC-ATC.

The leading of family and personal trips is not considered comparable and is not an acceptable substitute for leading AMC trips.

### **How to Apply to be a Co-leader**

Please note the above requirements list the *minimum* requirements needed to become an AMC Adventure Travel Co-leader. Meeting the above requirements does not automatically qualify you for AMC Adventure Travel leadership status.

To apply to become an AMC Adventure Travel Co-Leader, you must complete the following, prior to submitting an AMC Adventure Travel trip proposal:

1. Submission of the *Application to Become an AMC Adventure Travel Leader or Co-leader* (found on the AMC Adventure Travel (AMC-AT) leader website and in the appendix) at least one month prior to the proposal deadline for a trip which you are planning to co-lead.
2. Letter of recommendation as stipulated in Co-Leader requirement #3 (see above, page 1-1).
3. Completion of as many chapter trip requirements as possible (these are listed in Co-Leader requirements #3 and #4 above and on the *Application to Become an AMC Adventure Travel Leader or Co-Leader*).

If you are a first time AMC Adventure Travel trip co-leader it is strongly recommended that you be present at the AMC-ATC meeting at which you wish your trip to be considered.

Other requirements, such as the first aid and CPR certifications, can be done after a trip proposal is submitted, but must be completed at least one month prior to departing on the trip. It is also highly recommended that Co-leaders complete the AMC Adventure Travel Leadership Training weekend before submitting a trip as a Co-leader, but if the timing does not work, the AMC-ATC will consider the trip proposal pending completion of this training. The 3+ day trip must be completed four months prior to the trip departure date.

### **Co-leader Traineeship Program**

This is a program established to allow existing leaders to meet new co-leaders in a context that would encourage them to lead a trip with them in the future. This program will provide up to \$1,000 as traineeship grant towards participation in a domestic AT trip. On average the trainee will still be paying \$1,000 or more including airfare. Approval of a traineeship is through vote of the executive committee.

Program specifics:

1. Co-leader must have completed ALL co-lead requirements excluding WFA/CPR before applying. The grant is provided AFTER the trip runs.
2. Co-leader must be accepted onto the trip through normal interaction with trip's leaders. Trip leaders must agree to support the traineeship as described below AND to consider leading a trip with the trainee should the relationship workout to the mutual satisfaction of both.
3. Co-leader would be considered a 'leader trainee' and would participate in all significant leader meetings and considerations from the time of acceptance onto the trip through the execution of the trip.
4. The traineeship does NOT fulfill the co-lead requirement required to becoming a leader because the trainee will not have participated in the trip's development, screening of participants, etc. It could contribute to an accelerated path to leadership status.

Eligibility criteria for trainees applying for this program:

1. Meet all co-leader requirements excluding WFA and CPR
2. Be within two years of attending an AT new leader weekend workshop
3. Have attended at least one ATC quarterly meeting/year since the weekend workshop.
4. Not currently working with a leader on a trip

### **Leader Requirements**

The leader of an AMC Adventure Travel trip is required to have successfully led other trips for the AMC. Although leading trips for other organizations is valuable, AMC leadership experiences insure an understanding of AMC practices. The leading of family and personal trips is not considered comparable and is not an acceptable substitute for leading AMC trips. The minimum qualifications for an AMC Adventure Travel Leader are:

- #1 Be a current member of the Appalachian Mountain Club.
- #2 Have taken an AMC sponsored leadership course such as the Club's Mountain Leadership School, or the leadership training courses sponsored by Club Chapters, Camps, or committees.♦
- #3 Have successfully led at least 3 weekend AMC Chapter trips and be recommended in writing by the Chair or Leadership Coordinator of the Chapter or Committee responsible for oversight of these trips.

---

♦ The AMC Adventure Travel Committee may approve waivers of these requirements, at their discretion, based on the potential leader or co-leader's documented previous leadership and training experience.

- #4 Have successfully demonstrated leadership skills by having a significant role in the planning, organizing and executing of a longer trip by leading an AMC Chapter trip of five or more days and have obtained positive participant feedback from the online survey that is arranged by the AMC Adventure Travel Programs Manager.

OR

Have co-led an AMC Adventure Travel trip with an experienced Leader, have obtained that leader's written recommendation, and have positive participant feedback from the online survey for that trip.

- #5 Have the required Wilderness First Aid and CPR certifications listed below for any trip that is proposed.

- #6 Have attended the weekend-long intensive leadership training course offered by the AMC-ATC.

It is highly recommended by the AMC-ATC that a new leader first co-lead with an experienced Adventure Travel Leader. It is also recommended that new leaders consider planning a less complicated trip (e.g., domestic, shorter in length, front-country, etc.) or a trip they have done previously, before proposing complex international trips. This will allow the AMC-ATC to evaluate leadership and trip planning skills on a trip that involves less risk.

### **How to Apply for Leader Status**

Once a Co-leader has successfully co-led an AMC Adventure Travel trip and received positive participant evaluations, he/she must get a letter of recommendation from the leader of the trip. This letter of recommendation should be sent to the AMC Adventure Travel Programs Manager. This should be done prior to submitting an AMC Adventure Travel trip proposal. If a Co-leader is doing a five-day chapter trip in lieu of doing an AMC Adventure Travel co-lead, then he or she must get a recommendation in writing from his or her Chair, Leadership Coordinator of the Chapter, or Committee responsible for oversight of the trip. They must also receive positive feedback on the participant evaluations.

Prior to submitting a trip proposal, a request to be approved as an AMC Adventure Travel Leader should be submitted to the AMC Adventure Travel Programs Manager. It is appropriate but not required to resubmit the *Application to Become an Adventure Travel Leader or Co-leader* (found on the AMC Adventure Travel (AMC-AT) leader website and in the appendix) in order to update any information on the form. If this is your first time as an AMC Adventure Travel trip leader, you *must* be present at the AMC-ATC meeting at which you wish your trip to be considered.

### **First Aid Certification Requirements Summary**

- Current CPR certification
- Current Wilderness First Aid (WFA) certification
- Family trip leader requirement: All leaders and co-leaders that run trips involving children under the age of 18 are required to provide a criminal background check (criminal offender record information) and complete an online child safety training

course prior to trip departure. The criminal background check and child safety training are valid for three years.

### **AMC Adventure Travel Leader and Co-Leader First Aid Certifications and Maintenance**

All AMC Adventure Travel Leaders and Co-Leaders submitting a trip proposal must have the minimum of CPR and a Wilderness First Aid certification that will be current at the time of the trip or a specific plan to obtain certification prior to the trip. Please submit copies of the certifications to the AMC Adventure Travel Programs Manager at 10 City Square, Suite 2 Charlestown, MA 02129 or email (preferred).

Wilderness First Aid and Advanced Wilderness First Aid are offered as standard courses through various organizations. If you are certified by an organization that offers differing courses but encompasses wilderness emergency medical training or the emergency medical training specific to the activity on your trip, the certification simply needs to be approved by the AMC Adventure Travel Programs Manager.

The AMC will reimburse a leader for a portion of the cost of the training in Wilderness First Aid, Advanced Wilderness First Aid, CPR, or approved re-certification courses. To obtain reimbursement, send copies of the Wilderness First Aid or CPR certifications, as well as details on the provider and cost of the training, to the AMC Adventure Travel Programs Manager, 10 City Square Suite 2 Charlestown, MA 02129.

A total of up to \$300 in reimbursement can be requested in a two-year period for CPR and WFA, AWFA, WFR and WEMT.

### **Resources**

CPR can be taken through several different organizations, most commonly the American Heart Association and the American Red Cross. Both organizations offer several different levels of training, so course lengths and prices will vary.

- **American Red Cross** – [www.redcross.org](http://www.redcross.org) (Standard training is “Adult CPR.” Look in the *services* section of the website for course details.)
- **Stonehearth Open Learning Opportunities (SOLO)** – [www.soloschools.com](http://www.soloschools.com)
- **Wilderness Medical Associates (WMA)** – [www.wildmed.com](http://www.wildmed.com)
- **American Heart Organization** – [www.americanheart.org](http://www.americanheart.org)

### **AMC Adventure Travel Leader Compensation and Conflicts of Interest**

A goal of the AMC Adventure Travel program is to have trips run by "volunteer" Leaders and Co-Leaders who do not receive compensation.

The AMC's *Leadership Requirements and Guidelines* issued by the Outdoor Leadership Development Committee (OLDC) and which apply to all AMC volunteer leaders states the following:

"If a Club unit sponsors activities that require leaders to collect money from participants, that Club unit must have a clear policy governing activity finances. This policy may or may not include reimbursing leaders for trip expenses and/or providing for free trips for leaders. This policy may NOT include any compensation for leaders BEYOND direct reimbursement for trip expenses and/or a free trip. Club units are also 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."

The complete text of the Leadership Requirements and Guidelines may be found at:  
<http://www.outdoors.org/pdf/upload/leader-requirements-current.pdf>

Consistent with the program goal and the OLDC Requirements and Guidelines the AMC Adventure Travel Committee has adopted the following policies:

1. AMC Adventure Travel Leader and Co-Leader functions are to be provided on a volunteer basis. Compensation of a Leader or Co-Leader by an employer (i.e. an agency, outfitter, tour operator, travel provider and/or vendor) for activities related to their AMC Adventure Travel trips is not allowed.
2. AMC Adventure Travel Leaders and Co-Leaders need to promptly disclose to the Adventure Travel Committee any relationships with persons or organizations that might result in or be construed as:
  - a. creating a conflict of interest.
  - b. the Leader or Co-Leader being compensated.

## Chapter 2

# Planning a Trip

---

This chapter is intended to be used as a guide for the planning and execution of your trip, from start to finish. Certain aspects of this process are dealt with in greater detail in other chapters. First, below is an overview and timeline to help in navigating the process. Each topic is discussed in greater detail later in this Chapter.

### **Overview and Timeline**

<b>18-24 Months Out</b>	<b>Initial Planning and Research, Key Factors to Consider</b> The issues in this section should be dealt with before the timeline of your trip even begins. Doing this will help you get started on the right track. You will need to consider the overall concept of your trip, its uniqueness, appropriateness, your needs as a new leader or as an experienced leader trying out a new location, and the selection of a co-leader, travel agent, guide, and/or outfitter. You may consider putting your trip idea on the Prospective Trips List.
<b>12-18 Months Out</b>	<b>Prepare Proposal, Prospectus, and Other Pre-trip Communications</b> This is the process by which you outline all the details of your trip, have it approved by the AMC-ATC, and then be able to thoroughly explain it to prospective participants. ATC will not approve trips whose leader and/or co-leader has not attend an ATC meeting at least once every 3 years. Attendance by phone is not an acceptable alternative. The executive committee may on request grant an exemption based on travel hardship. The rule will be enforced beginning January 2021.
<b>6-12 Months Out</b>	<b>Reservations, Deposits, and a Bank Account</b> Complete reservations for every element of your itinerary including transportation, lodging, and guide services. Set up an AMC bank account.
<b>3-12 Months Out</b>	<b>Communicate with Participants</b> Send out a trip prospectus and receive applications from possible participants. Acknowledge receipt of funds and applications. Finish gathering any needed information including information about potential drivers from participants and assess the status of those registering for the trip. You should also collect airline information and flight locator numbers from your trip participants, if you are not doing a group flight.
<b>0-3 Months Out</b>	<b>Prepare Final Information</b> Take care of any leader contingency plans, final communications, pre-trip meetings, and send the motor vehicle record check authorization forms, final trip itinerary, insurance roster, flight locator numbers, and emergency contact list to the AMC Adventure Travel Programs Manager.

<b>During the Trip</b>	<b>Lead a Successful Trip</b> Facilitate an enjoyable trip, with safety being the top priority. Take time to focus on the educational content of the trip and how it relates to AMC's mission. Keep an accurate trip expense journal and save all receipts. Report immediately any incidents that require medical attention or departure of a group member to the AMC Adventure Travel Programs Manager or the AMC-AT Chair.
<b>Post-Trip Follow up</b>	<b>Submit Final Reports</b> Report any incidents or accidents if you did not do so at the time they took place. Complete online leader trip report within 30 days of your return. Complete the final revenue and expense report and mail it to the AMC-ATC Treasurer within 90 days (or sooner) of the trip's completion. This report should include appropriate receipts, and a check for the AMC-AT program expenses and for the emergency medical evacuation insurance. All required reports and payments for the trip must be submitted before you plan another trip. Any unresolved problems pertaining to the trip must be resolved before proposing a new trip.

### **Initial Planning and Research, Key Factors to Consider (18-24 months out)**

In general, there should be not more than 18 months between trip approval date to trip commencement date. Trips may be approved up to 24 months in advance of trip start date if a good reason exists, e.g. additional time to market complex/exotic trips, long lead times for reservations, etc. Trips with longer lead times should have more conservative financial plans reflecting that planning uncertainty, financial and otherwise, increases with time.

AMC AT trips are intended to be unique in that they should:

- Not duplicate trips that are generally available from commercial tour operators or commercial travel agencies, etc.
- Improve the participants' outdoor skills and their knowledge of the culture, ecology, and other aspects of the area in which the trip takes place. This education is to support the Club's overall mission as an advocate for self-propelled outdoor recreation and conservation of the environment.
- Contain elements of outdoor activity such as hiking, backpacking, biking, canoeing, sailing, skiing, swimming, snorkeling, etc.

The first step in trip planning is to develop a list of potential places you would like to visit – both domestic and overseas. Helpful information for generating this list can be found in travel sections of newspapers, internet resources, travel magazines and discussions with other leaders and potential participants. You should involve the co-leader in planning the trip, from the earliest point possible.

Once you have generated this “dream list” of possible trips, go through and choose those that are practical for you within the next year or two. Among the factors to consider are:



- ✓ Your own interests in the area or activity.
- ✓ **Your abilities to effectively lead such an activity.**
- ✓ The availability of a co-leader whose knowledge of the area/or skills may complement your own.
- ✓ Avoid areas where there is a potential for strife, unrest, or governmental instability.
- ✓ Avoid overlapping or competing with other AMC trips. Check the Prospective Trips List on the AMC-AT Leader website (See: <https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite/Dibs%20List/Forms/AllItems.aspx>) to verify that no other leaders are offering (or planning to offer) a similar trip to the same destination.
- ✓ Interest levels in previous trips of a similar nature (numbers of participants, cancellations, waiting lists – consult with the AMC-AT Chair or the AMC Adventure Travel Programs Manager. Their contact information is in the Introduction to this Handbook.
- ✓ **Appropriate/ideal dates** for the trip, especially if you are aiming at a particular audience (school teachers who have the summer off, families with children who must coordinate trips with school vacations, etc.) or particular weather conditions (snow, bugs, rainy seasons, etc.)

Contact the Dibs Coordinator, the Adventure Travel Programs Manager and check the Prospective Trips List to learn whether other AMC leaders are considering a similar trip in the near future. You may also ask them about other leaders who may have done similar trips. The AMC-ATC maintains a list of all approved trips as well as trips that have been proposed, but not yet approved. These lists are on the AMC-AT leader website.

#### ➤ **New Leaders and New Location**

If you are a first time AMC Adventure Travel trip leader, you are strongly encouraged to plan your first trip to a location within the North American continent, preferably to a place that you have been before. This is especially important for any leaders who may have been waived from co-leading before leading.

If you are proposing an international trip to an area with which you have no previous experience, you are encouraged to investigate the benefits of using a local guide for logistical, educational, language or safety purposes. Your first trip outside the United States and Canada should be to a place you have previously visited.

Trips may be led anywhere that the U. S. State Department allows, provided that the AMC-ATC feels that the country is both physically and emotionally safe for the participants. For the State Department's list of countries with travel warnings, visit:

<http://www.travel.state.gov/travel/> .

#### ➤ **Guides, Travel Agents, Tour Operators, and chartered transportation.**

The AMC-ATC encourages trip leaders to carefully consider whether to hire an agent, outfitter or guide for AT trips. There are now companies and persons that provide these kinds of services and their offerings vary from making a few reservations to providing comprehensive logistics and guiding services in the field. In some cases, the use of an outfitter to aid a trip may simply add no value and not be justifiable. However, certain trips require the use of a guide because of technical, cultural, or educational elements of the

itinerary. If an outfitter or guide is necessary, take great care in their selection and consult with the AMC Adventure Travel Programs Manager. There is a list of basic questions you should ask when considering a tour operator in Appendix D of this handbook. Pertinent elements of [Appendix D](#) must be submitted with the trip proposal and budget form. Some degree of judgment is needed in most cases. In those cases, in which you utilize a guide service, tour operation, or chartered transportation, for a significant portion of the trip we require that we ask for a copy of the Certificate of Insurance (COI). It should be sent to the AMC-AT Programs Manager.

**Definition of “Outfitter”** – a person or company that provides much of the on-the-ground leadership and responsibility for most of the trip.

Some factors to be considered in deciding whether to use an outfitter are:

**Use of Outfitter Indicated:**

- Area requires a permitted guide to accompany any organized travel group (definition of “organized group” may vary from place to place)
- Language or cultural differences are significant (and English is not widely spoken)
- Specialized gear (kayaks, horses, bikes) and/or logistical support is required
- When there are cost savings compared to no outfitter
- To provide knowledge and expertise that AT leaders can’t reasonably acquire
- Unmapped area (such as certain regions of Mongolia or Morocco)
- When cultural exchange (with local guide[s]) or intimate exposure to culture is essential to the trip
- To acquire new knowledge or skills and to expand AMC’s independent reach (one-time, scouting).

**Outfitter Use Not Indicated:**

- When a trained leader *should* have the ability to plan and run the trip
- Outfitter adds no additional value past what a trained leader can provide
- When the outfitted trip would significantly vary from AMC culture – doing activities in a group, environmental ethic of outfitter, cost, activities done on trip, etc.
- Domestic (U.S./Canada) trips or other English-speaking area (though exceptions may exist, such as remote regions of Alaska or the Canadian northwest)
- Easily researched areas
- Front country/urban environment
- Trips of a similar nature have been successfully run by leaders without an outfitter.

All tour operators, outfitters, guide services, travel agencies and other such companies or person(s) which are used for a significant part or all of the trip must be vetted by the AMC Adventure Travel Programs Manager. It is recommended that you contact her or him just as soon as you begin to consider using one. You don’t want to work with an organization that won’t pass muster.

Good outfitters can provide valuable assistance in planning a trip and it is important to establish a working relationship with them. It is suggested that you should have a single point of contact. Outfitters are compensated for their services in many ways. You may get better service from an agent who charges a modest fee and such should be itemized in the

trip budget. Cost, quality, deposit/refund policies, and insurance coverage vary widely. Shop for the best deal for your group and be prepared to present information regarding your choice when presenting your trip proposal to the AMC-ATC.

The AMC-ATC may challenge and/or withhold approval of trips for unnecessary use of outfitters or guides as well as for the lack of their use where it is clearly essential.

### **One AMC Leader or Two on an Outfitted Trip – Factors to Consider**

The natural follow-up question to whether outfitter use is appropriate on any given trip is how many AMC volunteer leaders should be used on an outfitted trip. The norm for Adventure Travel trips without an outfitter is two leaders: a leader and a co-leader. The Adventure Travel Committee will consider proposals on a case-by-case basis for trips with an outfitter to have just one AMC leader. Some factors to be considered in deciding whether to have one or two leaders are:

#### **When One Leader on an Outfitted Trip May Be Appropriate:**

- Very experienced leader
- Small Group
- Multiple guides are provided
- Where there is little value added by having a second AMC leader
- If the outfitter can provide full beginning-to-end support
- No serious impact to overall trip if leader is incapacitated
- Is in the U.S. or Canada
- English speaking guide who also speaks the local language
- No anticipated need to divide the group
- No backcountry component
- The group is “contained” in a small/controlled area, e.g. on a bus, or, say, on a city walking tour
- A place that leader knows well
- First world location

#### **When Two Leaders on an Outfitted Trip May Be Appropriate:**

- Serious impact to trip if leader becomes incapacitated
- Large group
- First time AMC trip has been run to the area
- Outfitter:
  - provides minimal services (not full service)
  - Only provides equipment or services (logistics, transport, accommodation, etc.)
  - provides route support but is not responsible for group or trip management
- A new leader
- Only guiding on part of the trip
- Kids (family trips)
- Exotic locales – in a foreign country not frequently visited
- Skills of the two leaders complement each other and those of the outfitter/guides and add significant value to the participants’ overall trip experience

- Group may split to do different activities, or the nature of the trip may result in group getting quite spread out over a long distance (cycling, cross-country skiing, for example)

It is appropriate to attach to the trip proposal a statement as to why the leader wishes the ATC to consider this trip as a one-leader trip. There must be an AT-qualified leader who is familiar with the trip plan as a backup at the time the application is submitted. The backup person should commit that they will keep their calendar clear so that they could step in if the leader were incapacitated either before or during the trip.

### **Utilizing an outfitter to lead the outfitter's publicly available travel itinerary**

The AT program focuses on providing high-value, unique travel experiences. It therefore discourages a leader from simply engaging an outfitter to execute an outfitter's publicly available itinerary for an AMC audience. This approach often results in low AT value-added: a steep price premium for an identical experience.

In some locations hiring an outfitter to perform the outfitter's publicly offered itinerary cannot be avoided. Participants may still be interested in going with AT for a reasonable price premium because they value the AMC umbrella (known leader, screened & like-minded participants, evaluated outfitter, etc.) versus going with an outfitter directly. In this situation:

- The leader should customize the central portion of the trip (or what comes before or after it) to the greatest extent possible
- The AT trip pricing should be competitive with that offered by the outfitter. Bringing a large group will enable a leader to negotiate outfitter price discounts, free AT leader accommodations/meals, etc.

The AT Committee will make the final judgement as to whether sufficient leader effort has been exerted to customize the trip and negotiate an outfitter price discount.

### **➤ Research and Early Planning**

Once you have selected a potential trip, you are ready to start trip planning. In general, there should be not more than 18 months between trip approval date to trip commencement date. Trips may be approved up to 24 months in advance of trip start date if a good reason exists, e.g. additional time to market complex/exotic trips, long lead times for reservations, etc. and should be indicated on the trip proposal form. Trips with longer lead times should have more conservative financial plans reflecting that planning uncertainty, financial and otherwise, increases with time.

1. Obtain information needed to outline the trip. Develop plans about where you will travel and what you will do there. This may require the assistance of a travel agent and/or extensive online research. Obtain the information necessary to prepare a trip budget. This budget should include airfare (or other means to get to the area), lodging, food, local transportation costs, and all trip related expenses. See Chapter 3, *Costing a Trip*, for more details.

2. Obtain any maps or other publications needed to conduct the trip. Avoid excessive travel by mapping out how long each leg of your trip will take and other important details.
3. Make **tentative** reservations if you can do so without a deposit. **It is strongly recommended that personal funds not be committed before the AMC-ATC approves the trip.**

Trips are approved after consideration of a formal proposal at an AMC-ATC meeting. The Committee meets at the AMC Annual Meeting, the AMC-AT Spring Retreat, an AMC-ATC summer meeting, and the AMC-AT Fall Meeting. For dates and submission deadlines see: [https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite/SitePages/Committee-Meetings-and-Proposal-Deadlines\(1\).aspx](https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite/SitePages/Committee-Meetings-and-Proposal-Deadlines(1).aspx). ATC will not approve trips whose leader and/or co-leader has not attend an ATC meeting at least once every 3 years. Attendance by phone is not an acceptable alternative. The executive committee may on request grant an exemption based on travel hardship. The rule will be enforced beginning January 2021. You may indicate your interest in leading a trip before submitting a formal trip proposal, by posting your trip on the Prospective Trips List. For inclusion on this list, you will need to submit the destination, type of trip, and the month or season you wish to run the trip, to the Dibs Coordinator and AMC-AT Programs Manager. You can submit your trip to this list up to two years in advance but must propose it formally *one* year in advance. When formally approved, your trip will be removed from the Prospective Trips List. For a full description of the policy related to posting to the Prospective Trips List, consult the AMC-AT Leader website (<https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite/Dibs%20List/Forms/AllItems.aspx>).

### **Prepare Proposal, Prospectus, and Other Pre-trip Communications (12-18 months out)**

The trip proposal form, cost/budgeting worksheets, outfitter/tour guide questionnaire, prospectus requirements and standard language are in the [Appendices](#) of this Handbook and on the AMC-AT Leader website. Always use the versions found online as they are the most current. It is required to send the completed proposal, budget, and prospectus *electronically* to the Chair of the AMC-ATC and the AMC Adventure Travel Programs Manager at least three weeks prior to the next scheduled Committee meeting. Reminders will be sent out on the AMC-AT leader listserv. If the AMC-ATC receives two similar trips for the same meeting, preference will most likely be given to the trip that was posted on the Prospective Trips List, so it is to your benefit to check that list before you start working on your proposal.

#### **➤ AMC Adventure Travel Trip Proposal Form (this form is in [Appendix C](#)).**

- a. **SUMMARY OF TRIP INFORMATION:** The most pertinent information is listed at the beginning of the trip proposal form: the title of the trip, names of the leader and co-leader(s), dates, number of days, type of trip, minimum and maximum number of participants,<sup>2</sup> trip rating (see [appendix V](#)), advertised cost with or without airfare, and

---

<sup>2</sup> Do not include the leaders in this number. Trips will be approved for a planned minimum and maximum number of participants and at a planned cost.

airfare range if not included in the advertised cost. Here also is specified the first and last dates for publication of the trip notices in AMC Outdoors and when the notice should first appear online on outdoors.org.

- b. **LEADER INFORMATION:** List the names, addresses, phone numbers, and e-mail addresses of the leader and co-leader(s).<sup>3</sup> Provide proof that leaders have met their First Aid and CPR requirements or will meet them prior to the departure of the trip. Also included in this section is information about language skills, if the leaders have a significant relationship,<sup>4</sup> and if either leads private trips.<sup>5</sup>
- c. **LOGISTICAL DETAILS OF TRIP:** Write a summary and description of the trip and the activities planned (executive summary). If you plan two levels of daily activities (e.g., beginners and advanced), you should indicate this. Then you should describe what type of accommodations will be provided (e.g., hostels, camps, hotels), your plans for providing meals, and your plans for local transportation including if leader and/or volunteer participant drivers will be used. Information on permits or special permissions, equipment, experience required by the participants or leaders<sup>6</sup>, and whether there will be any pre-trip activities should also be included. Lastly, the summary should have information on the recreational, skills development, educational, cultural or natural history, and conservation goals of the trip.

If you are planning a trip to a National Park or National Forest, contact the park's Special Use/Commercial Permit Administrator for permission before submitting the trip to the AMC-ATC for approval. Get any approvals **IN WRITING!** Some parks and forests are tightening up on limitations on group size and/or requiring use of a local park outfitter or require a special permit process (some require additional fees as well). It is unethical if you go to a park that considers the AMC a commercial operator, and due diligence is better than having the AMC be banned from entering the park in the future. Contact the AMC Adventure Travel Programs Manager for assistance with necessary forms and applications.

- d. **TOUR OPERATOR AND GUIDE SERVICE INFORMATION:** If you plan to use a tour operator, outfitter, guide service, travel agency, chartered transportation or other such company or person(s) for a significant part of the trip you should indicate your reasons for doing so. You should also complete the outfitter questionnaire (Appendix D)

---

<sup>3</sup> For new leaders, a completed *Application to Become an AMC Adventure Travel Leader or Co-Leader* and a reference from the person's chapter chair or activity committee chair should be sent separately to the AMC Adventure Travel Programs Manager at least one month prior to submitting the trip proposal.

<sup>4</sup> In the event the leader and co-leader of the trip are a couple or have some other similar significant relationship; the leader must submit a back-up Leader to the AMC-ATC at the time of approval.

<sup>5</sup> If either of you do lead private trips, any publicity for the private trips must make it clear that they are not AMC sponsored trips. Mailing information about private trips to people who have contacted you regarding an AMC trip is not allowed and can put you and the AMC at serious risk.

<sup>6</sup> If the trip requires special technical skills, written approval of the appropriate Chapter or Interchapter Chair must be obtained (e.g. Canoe, Mountaineering). This requirement does not apply when the leader has already successfully led a comparable technical trip.

and submit with the trip application. Also include their contact information, safety records, and liability insurance levels. In addition, you should ask for a copy of the Certificate of Insurance (COI). It should be shared with the AMC-AT Programs Manager. Any person(s) or companies that are handling a significant portion of trip funds or arrangements need to be vetted.

- e. **RISK ASSESSMENT:** This section must be filled out thoroughly or your proposal will be rejected. This is where you will assess the risks and hazards of your trip, even if they are obvious. Carefully consider each area of risk and how it will affect your trip. Devise a plan to prevent each hazard and how you will respond to it if it becomes necessary. Sections include climate and terrain, foreign country hazards, transportation hazards, participant experience, and other conditions that may be unique to the type of trip you are proposing.
- f. **EMERGENCY ACTION PLAN:** This section is also *essential* and corresponds to the previous section. Describe your plans for dealing with any emergencies that may arise on your trip, including what sort of emergency communication access or equipment you will need, an evacuation plan, and what medical resources are available to you.
- g. **COST AND BUDGET DETAILS:** This section is based on research and your estimated trip budget. You will list what deposits will be required from you for the group and the related refund policies for the various vendors and services you will use. You should list any deposit that is non-refundable. Separately you should describe what the participant deposit and cancellation policies will be. Be sure to schedule the payment installments from the participants in time to meet the deposit requirements for airline, hotels, outfitters, etc., so that you do not put any personal money at risk. This section also asks if foreign currencies are involved and what your assumptions about the exchange rates are.

**BUDGET FORM:** You will be expected to include a detailed trip budget (separate from the proposal under **Appendix E**) that shows how you derived your advertised cost. The submitted budget should include brief statements or notes about any assumptions that you have made and should also identify the sources of your estimates. There are samples of summary trip cost estimate worksheets in the Appendices. These worksheets do the calculations needed to determine an advertised trip price. However, these are summary worksheets and details supporting the summary should also be submitted. For example, the AMC-ATC members prefer to see a night by night listing of lodging costs and not just a single number that summarizes the lodging costs for the entire trip. Include the base (minimum) number of participants that you used in developing the cost per person. Remember to include the AMC-AT program expenses fee at 20% of land and/or water costs, a contingency of 4-8%, and an extra contingency for exchange rate changes if foreign currencies are involved. If you plan to utilize a local guide or outfitter, you should indicate this and include the costs attributable to such guides. Also indicate whether the airfare is included in the trip cost. Chapter 3, *Costing a Trip*, provides additional information about this subject.

**TRIP PROSPECTUS:** All leaders are encouraged to submit a draft of their trip prospectus with their trip proposal. If you do not have a draft prospectus when you submit your proposal, include a trip summary and day-by-day itinerary which includes items 1-8 of

[Appendix U](#) – Standard Prospectus Components. You can find standard prospectus language in [Appendix T](#). After your trip is approved, you should send the prospectus electronically to the AMC-ATC webmaster if you wish to have a link to your trip description on the AMC website. Do not include your participant application form with the prospectus.

- a. **Trip Rating System:** AMC Adventure Travel excursions are rated on a scale of 1 to 5, with 1 being the easiest and 5 the most strenuous. The trip rating should be listed in the prospectus. Please review the [Appendix V](#) for trip rating information and guidelines.

➤ **Items not included on the Trip Proposal Form but required as a part of the application process:**

- b. **TRIP NOTICES:** Please use the Advertising template found in [Appendix Y](#). Magazine (50 words maximum) and web (450-word maximum). The notices should be written as plain text without formatting (i.e., as a .txt file). If you have not already, you must send them electronically to the AMC-ATC webmaster as soon as your trip is approved. When counting words, stop when you reach “For info ...” Information and instructions can be read in Appendix Y.

If you are a first time AMC Adventure Travel trip Leader, or a first time Co-leader, you must submit the Application to Become an AMC Adventure Travel Co-Leader or Leader (See the Appendices) that supplies information about your previous leadership experience and certifications at least one month prior to submitting a trip proposal. You must also provide a reference statement from your Chapter Excursion Chair or Chapter Chair. If this is your first time as an AMC Adventure Travel trip Leader, you *must* be present at the AMC-ATC meeting at which you wish your trip proposal to be considered. If you are a first time AMC Adventure Travel trip Co-leader it is strongly recommended that you be present at the AMC-ATC meeting at which you wish your trip proposal to be considered.

➤ **Approval, Publication of Trip, and Leader’s Package**

After the trip is approved by the AMC-ATC, you will be emailed a leader’s package that will include: an official notification of approval of the trip, an assigned AMC-AT trip number, any conditions you will need to meet (i.e., certification renewals, budget changes, etc.), time frames for submission of trip rosters, emergency contact information, optional travel insurance, emergency medical evacuation info to be given to participants, and an update on any policy changes adopted since the last update of the handbook.

After your trip is approved, leaders and/or co-leaders may not be changed without the approval of the AMC-ATC. If there is no AMC-ATC meeting before your trip starts, the AMC-EC may approve the change. This rule is waived in the event of emergencies such as trailhead problems and sudden illness, but the AMC-ATC Chair and the AMC Adventure Travel Programs Manager must both be notified.

A trip does not become an approved AMC Adventure Travel trip until it is approved by the AMC-ATC. The magazine listing will appear in the subsequent magazine after trip approval. If the trip fills, please contact the AMC Adventure Travel Programs Manager and



the AMC-ATC webmaster. They can also change the status of your trip online to (W) – waitlisted or (F) – full.

### ➤ **Adventure Travel Trip Cancellation or Changes to itinerary**

Once approved and published, you cannot make any major changes in the dates or itinerary without approval from the AMC-EC. **In no case may an AMC Adventure Travel trip that has been published in *AMC Outdoors* be run as a private trip.** Failure to comply with this policy will result in removal of the leader's name from the list of approved AMC Adventure Travel leaders.

If an insufficient number of people sign up for the trip, the trip may end up being cancelled, or the Leaders may elect to run the trip and pay part or all of their own expenses. The leader(s) will only contribute monies should the collected trip revenue not cover all the expenses as they are estimated in trip budget.

If a leader chooses to cancel a trip that been approved and/or publicized, the leader must **first** consult the AMC-ATC Chair and the AMC Adventure Travel Programs Manager **prior** to contacting trip participants who have already signed up and any tour operators - or any agency or any vendors with whom there has been negotiations for the planned trip. Likewise, if your trip is slow to fill and you are getting concerned, please contact the AMC-ATC Chair and the AMC Adventure Travel Programs Manager so they can offer some marketing advice. They would like to have the ability to strategize with you before having you take any drastic measures. Lastly, if you find your trip is filling quickly and there is a chance that there may be enough participants for a second section, the AMC-ATC Chair and the AMC Adventure Travel Programs Manager would like to know that as far in advance as possible, so they have enough time to recruit leaders and advertise a second section of the trip.

### ➤ **Communications Preparation**

After your trip is approved, **finish writing or editing your prospectus** and send it to the AMC Adventure Travel Programs Manager and the AMC-ATC webmaster. See Chapter 4, *Communications*, for more details.

**Prepare your participant application form.** This form should collect the information you will need to help screen participants and provide data for mailings, making reservations and other logistical matters (i.e., finding drivers for rental vans). The application form should not request medical information as the required AMC medical forms have been vetted for compliance with relevant laws. There are sample application forms on the AMC-AT Leader website under *Sample Forms*. The required medical forms and release of liability form are in the [Appendices](#). You should refer to the AMC-AT Leader website before each trip to verify that you have the most current forms. If you need drivers, ask about willingness to drive and any special qualifications and indicate that drivers must agree to AMC-AT driver policies and to have their motor vehicle records checked (See Chapter 7 and Appendix S1 for these policies and the authorization form). Make copies of these forms and the prospectus for distribution to potential applicants. You should be able to send them

electronically to save money on postage and to get them to potential participants more quickly. See Chapter 4, *Communications*, for more details.

**Prepare an acceptance letter** once you start getting trip inquiries. This letter will be sent out to participants when they sign up and make an initial deposit once you have enough deposits from participant so that you can commit the trip to going. The letter should include a reiteration of the dates of the trip, information on the travel arrangements, an explanation of the optional travel insurance, required medical evacuation insurance, and a schedule of payments for trip fees. You may also include recommended readings and information about any pre-trip activities you would like to do.

### **Reservations, Deposits, and Bank Accounts (6-12 months out)**

**The trip leaders are responsible for handling all funds for the trip. Participants should be advised to make checks out to AMC and to send them to the leaders. All trip funds must be deposited in an AMC bank account that is set up in accordance with the requirements set forth in Chapter 6, *Financial Information*. Trip bank accounts in your own name are *not* acceptable.**

Set up an itinerary that covers flights, travel days, and anything else that may help you in planning the trip. Make airline reservations, reserve hotel rooms (get the hotel's cancellation policy in writing), reserve local transportation, make dinner reservations, and arrange for guides (if they are being used) to the extent that you can do so without risking funds that are nonrefundable. As you receive deposits from trip participants deposit them in the AMC bank account. Although, it is appropriate to hold and not deposit these until you have reached the minimum number of participants and the trip is definitely a go. If possible, you should only make non-refundable payments after you have received deposits from enough participants and the trip is definitely a go. Moreover, these payments should be covered by payments received from the participants. Consider paying for the plane tickets as soon as possible to freeze the price so that future price increases will not affect your trip costs. You can sometimes negotiate a refund if the airfares go down. See also Chapters 3 and 6 concerning details for making airline reservations.

### **Further Communication with Participants (3-12 months out)**

Keep trip participants updated on trip details through regular communication. You can do this as a simple letter or as a newsletter and it can be sent electronically or by regular mail. This will keep them engaged and excited about the trip. See Chapter 4, *Communications*, for more details.

If trip registrations are low, you may choose to run the trip with fewer participants. **Leaders are responsible for expenses that go beyond the total revenue of participant fees.** For example, if the total revenue for a trip is \$20,000 (10 participants x \$2000) and the total trip costs including leader expenses is \$20,350 then the leader is responsible for \$350 and the participants do not receive a refund. The specifics of this policy are described in Chapter 3. If you decide to run a smaller trip than planned, you and your co-leader may need to pay some of the trip costs. You should consult with the AMC-ATC Treasurer to verify the calculations of the amounts.

If it appears that the trip may become over-subscribed, the AMC-ATC may consider running a “second section” of the trip immediately before or after the listed trip or consider adding a third co-leader when feasible. You should notify the AMC-ATC Chair and the AMC Adventure Travel Programs Manager as soon as you become aware of this situation. You may also try to recruit other leaders to take on another section of your trip. Additional trip sections require a formal trip proposal, budget, and AMC-ATC approval.

### **Preparing Final Information (0-3 months out)**

**Consider a pre-trip meeting or activity with all of the participants.** A test hike, ride, etc., is strongly recommended for backpacking, biking, canoeing, skiing, and other trips that require specialized skills. On your proposal form, you should indicate your plan to do a pre-trip activity with your participants. The participants must sign the Chapter liability form before participating.

### **Motor Vehicle Records (MVR) Checking.**

- **Why is this important?** As an organization and as individuals, we have a legal duty to provide a reasonable standard of care to Adventure Travel program participants. Included within this duty is the responsibility that the AMC practices due diligence in vetting and approving participants and leaders to operate club owned or rented motorized vehicles. Our automotive insurance provider has required that we implement a motor vehicle record check prior to approving drivers of club owned or rented vehicles.
- **Who will this apply to?** Any leader/co-leader or participant on an AMC Adventure Travel trip will be required to adhere to the standards of the policy. MVR checks will be run on leaders and participants who wish to drive vehicles during an excursion. MVR checks will be run annually for those that drive on one or more than one trip in a year.
- **Who will implement it?** Trip Leaders and Co-leaders (referred to here simply as trip leaders) will be responsible for identifying drivers in advance of the trip. With staff at Joy Street, the trip leaders will ensure that all appointed drivers and back up drivers meet the standards in the Motor Vehicle Driving Policy.
- **What is the process?**  
The steps in the process are:
  1. The Trip Application for trips needing volunteer participant drivers should include a question asking the participants if they are willing to be a driver and notifying them that MVR checks will be made after they are accepted to the trip and before they can be accepted as a driver.
  2. Trip leaders identify candidate drivers (trip leaders and/or participant volunteers) and get signed MVR authorization forms (the form is attached to the Motor Vehicle Driving Policy and is in Appendix S1) from each such person.
  3. Once the trip is committed to go, the trip leaders should send the signed MVR check authorization forms to the AT Program Manager at headquarters.

It is suggested that this be done at least a month before the departure date of the trip. Earlier is better. See also the next section on timelines.

4. The AT Program Manager will forward the authorization forms to the AMC staff who do the MVR checks
5. The AT programs manager will notify the trip leaders of the results of the checks.
6. The trip leaders should notify the candidate drivers if their records are acceptable.

Some process considerations:

- The trip leaders may ask some or all candidate trip participants to complete the MVR check authorization form at the same time as they apply to join the trip, or they may collect the forms from selected participants at a later date.
- MVR check authorization forms should be submitted to the AMC-AT Program Manager only for participants who are being accepted to the trip.
- Trip leaders, who are drivers, may have MVRs checked annually.
- As not all trip circumstances can be foreseen (e.g., an intended driver does not pass the MVR check, a planned participant driver cancels just before the trip, one or more participant driver's flights are delay, etc.) it is good practice is to ask extra people to drive. Then there will be several approved people to choose from.
- No policy or process can address every possible scenario that might occur, and trip leaders, AMC-AT officers and AMC staff must use their best judgment when implementing the Motorized Vehicle Driving Policy for AMC-AT Trip Drivers. As with any emergency, if a problem with drivers occurs on a trip, contact the AMC-AT emergency contact persons (1-888-855-7970) and as a team we can make a decision on how to best handle the situation.

- **What is the timeline for the process?** The actual turnaround time for an MVR check is 1-3 business days. It is required that all MVR check authorization forms be submitted to the AMC-AT Program Manager at least 3 weeks (a month is preferred) prior to the trip departure date. This allows for mail delays in the forms getting to the Manager and other "what ifs". The authorization forms may be submitted earlier and doing so will reduce last minute crunches.

**Send off the final trip information for your trip to the participants.** This final mailing may include an updated itinerary, hotel and lodge names, addresses and phone numbers (for use in the event of emergencies at home), and the names and addresses of all participants. Also include the required equipment and packing list, even if you have already included it in previous mailings. If a group pick up is not planned or if there is a flight delay, include information on how to get from the airport to the hotel and on how to contact the leaders. Make sure to let the participants know how to reach the leaders in case of a change in their travel plans. There are samples of final trip information forms in the *Sample Forms* section of the AMC-AT Leader website.

Send the hotels, lodges, etc., a list of the names of participants and information about shared rooms. Alternatively, have such a list prepared before arrival at each destination.

**Two-three weeks before the trip**, the following documents and information must be sent to the AMC Adventure Travel Programs Manager at 10 City Square Suite 2 Charlestown, MA 02129:

- ✓ A final list of the trip participants (with their addresses) and emergency contact information. Include emergency contact information for the leaders as well.
- ✓ The emergency medical and evacuation insurance roster (*electronic only*).
- ✓ An updated trip itinerary and contact information for where you will be staying
- ✓ Record locator numbers for the flight(s) for all persons.
- ✓ A list of participants and leaders who purchased the optional travel insurance (if known).
- ✓ The original medical and liability forms. Keep copies of the medical forms and carry them with you at all times.

It is essential that the AMC knows who is going on the trip and where you will be throughout, in the event of an emergency at home or during your trip. If you fail to submit your trip participant list and trip itinerary to headquarters before your trip departs, you may be removed from the list of approved AMC-Adventure Travel leaders.

### **During the Trip**

During the trip, encourage trip participants to discuss the goals of the Club, the education aspects of the trip, and their involvement in AMC both during and after the trip.

Set and manage participants' expectations regarding the daily activities, schedule, transport logistics, etc. Hold a daily brief or meeting at the same time each day, such as at the end of breakfast and dinner. Also hold mini-briefings or meetings prior to performing higher risk activities or trail sections, or if conditions change, for example due to weather or logistical challenges.

Foster a sense of community and inclusion on your trip by being sensitive to group dynamics and actively stepping in by engaging participants in discussion along the trail, at meals, and by facilitating interaction among participants. If there are pre-existing friends or sub groups do your best to foster interaction with other participants. Enlisting "repeat customers" to assist in this may be a great help this as well.

If an incident or accident takes place during the trip that requires professional medical care or leads to the departure of a participant or leader, immediately contact the AMC on-call person designated to cover emergencies (this number is listed on your emergency wallet card), and also notify the AMC-ATC Chair or the AMC Adventure Travel Programs Manager as soon as possible. Do not wait until you return home. (Also see Chapter 8, II. Risk Management: Accidents, Incidents, and Emergency Response.)

Near the end of the trip, urge your trip participants to complete the online survey, which will be sent directly to them by the AMC Adventure Travel Programs staff. This is part of the AMC-ATC's effort to evaluate the success of the AMC Adventure Travel program and as part of the process of providing useful feedback to leaders.

Use other training opportunities such as Annual Retreat, Issues Blog and Leader Newsletter to expand, practice (case studies for example), and develop leaders' skills in using these practices.

### **Post-Trip Follow up (0-3 months after the trip)**

In the event of an accident or problem with your trip, send a written incident report to the AMC Adventure Travel Programs Manager. It is important for the AMC-ATC to track the number and types of incidents on AMC Adventure Travel trips.

Within 30-90 days of trip completion, the following documents must be submitted to the specified people:

- a. A request to complete an online survey report about the trip will be emailed to leaders upon their return. This should be completed by **both** leaders within 30 days of the trip's conclusion.
- b. A post-trip final revenue and expense report with receipts (paper or scanned copies are both equally acceptable) should be sent to the AMC-ATC Treasurer or your assigned financial reviewer within 90 days of your return (or sooner if possible). Additional details about this report are covered in Chapter 6, *Financial Information*. (Forms and a sample report appear in the Appendices and online under *Sample Forms*).
- c. A check for the required AMC-AT program expenses and a check for the emergency medical and evacuation insurance should be sent to the AMC programs manager. It is acceptable to wait with sending this check until you and the AMC-ATC treasurer agree on the appropriate amounts. You can send one check as long as the amounts for each are differentiated on your financial report. Make all checks payable to the *Appalachian Mountain Club*.
- d. Destroy copies of the confidential Medical History and Liability Release forms. Originals will be kept at AMC headquarters for at least 5 years following the completion of your trip.
- e. After your financial report has been approved by the AMC-ATC Treasurer or your financial reviewer, send any refunds that are due to the participants. Check with the AMC-ATC Treasurer to see if he/she has approved your financial report, if you are not contacted immediately.

Reports that are not submitted within three months from the end of the trip will be considered delinquent and will preclude consideration of proposals for future trips until the reports are received, unless the AMC-EC has agreed to an extension of this deadline. This delinquency can only be cleared at a meeting of the AMC-ATC. Leaders who are delinquent on a trip report may not submit an application for a future trip at the same meeting at which the delinquency is cleared.

## Chapter 3

# Costing a Trip

---

This chapter assumes that you have already decided where you want to go and have determined that there is enough to do at that location to qualify your trip as an AMC Adventure Travel trip.

### **Identify Costs**

When planning your trip, you need to identify all possible costs so that you can build a trip budget. This section provides a list of many common cost elements. Many of these are discussed in greater detail later in this Chapter. You may find it useful to prepare an outline itinerary for the trip that helps to identify each of the component resources to be needed. See the end of this chapter for an example.

- Transportation:
  - Air fare and fees and taxes, such as baggage fees and airport departure taxes.
  - Local transportation – trains, buses, rental vehicles, boats, etc.
  - Collision and/or loss insurance (CDW and/or LDW), extra driver fees and taxes for rental vehicles (make sure to call the local rental agency and have them itemize every single one for you!).
- Lodging – hotel, lodge, hostel, campground, etc., including all taxes and tips
- Meals – decide what meals you will include in the trip cost
- Tour operators, guides and/or translators their fees and gratuities as appropriate
- Sightseeing, including site and entrance fees (if applicable)
- Permit fees
- Taxes and gratuities
- Maps and guidebooks – for leaders (and for participants if you wish to include such items)
- Trip supplies – First aid kit (see [appendix X](#) and [appendix X1](#) for suggested first aid contents for leaders and participants), coolers, camping equipment, camping equipment rental, bear spray, etc.
- Shipping costs – Sending gear such as gas stoves, which cannot be taken on a plane, to the trip location. Do not send fuel; buy it locally.
- Administrative costs – phone, copying, postage, etc.

- Emergency communication equipment purchase or rental (satellite phones, satellite communicator, cell phones, two-way radios)<sup>7</sup>
- Contingency (see *Other Costs* section in this Chapter)
- AMC Adventure Travel program expenses fee, based on total land costs (mandatory).
- Emergency medical and evacuation insurance premium (mandatory)

## **Estimate/Calculate Costs**

### **➤ Transportation**

There are several options for reserving transportation to the location of the trip. A travel agent can book flights for you, quote a price, and usually give you a warning of rate increases. You can also use online websites (airline sites, Expedia, Orbitz, Travelocity) to help you get an estimate for individual fares from various cities and generally do not charge fees. It may be best to buy your tickets early depending on the cancellation terms so as to freeze flight prices – you may be able to get a refund if the price goes down. You should double check on your flight costs, check for free seats, or see if you qualify for a tour operator's pass. In some cases, you may be able to get a group fare at a discounted rate directly from an airline. Airport departure taxes exist in many locations. Check with your travel agent or consult a guide book to assure that these costs are factored in.

If you plan to use local trains or buses, call, check web sites or email for rates. If you use rented vehicles<sup>8</sup> (particularly vans), make reservations well in advance. You may even plan on making those reservations at the time you get your quote, as you rarely have to make any nonrefundable deposits. With rented vehicles, allow for collision and or loss damage insurance costs (see the section labeled Automotive Insurance for a full discussion of insurance considerations), gas, taxes (which are rarely quoted), and extra driver fees. Check with the AMC Adventure Travel Programs Manager before booking any trip that requires a charter flight, train, or boat, as there may be additional insurance requirements.

When renting vehicles, you should inquire about the various optional insurances. As described in Chapter 7, *Risk Management, Liability and Insurance*, AMC has extensive liability insurance for participants and leaders for both domestic and foreign travel. Moreover, medical and evacuation insurance is purchased for every leader and participant. Consequently, the purchasing of any liability or medical insurance is redundant and we advise leaders not to spend trip funds on such insurance.

---

<sup>7</sup> The AMC owns a satellite phone, InReach, and two-way radios, that can be used for Adventure Travel trips as long as it is available. Check with the Adventure Travel Programs Manager well in advance of the trip. It may be wise to budget in the cost of a rental just in case – also check with the Adventure Travel Programs Manager for information on satellite rental costs.

<sup>8</sup> You are not allowed to rent 15-passenger vans due to insurance restrictions. If you plan to drive on any unpaved highways or roads, check with the rental agency to make sure you will be covered since some companies do not allow their vehicles to go off paved roads.



There are two categories of insurance that are relevant when vehicles are rented for use during an AT trip:

A: Collision or losses due to damage to the rented vehicle. The purchase of Collision Damage insurance is sometimes referred to as CDW; that is, you are purchasing a collision damage waiver (CDW). The purchased insurance may have deductibles and limits on coverage. The actual coverage varies with the renting agency. Note that the location may be a franchise location and hence its coverage may not be the same as other locations of the same brand.

B: Loss of use: If a vehicle is damaged it may take days to repair and the rental company may charge for the loss of use during this period. This leads to the potential purchasing of a loss damage waiver (LDW). With some companies LDW includes collision coverage.

The amount that is at risk is the full value of the vehicle plus its loss of use for many days. Depending on the vehicle the potential risk is an amount of \$20,000-50,000 or more. AT leaders may agree to purchase CDW and LDW coverage when renting vehicles. The costs of such coverage are a legitimate trip expense and should be included in the trip budget. You must purchase this coverage when renting in countries other than the United States or Canada.

AT Leaders now have an additional option when renting or leasing vehicles in the United States, Canada, Puerto Rico, and the US Virgin Islands. AMC AT has a corporate account with National and Enterprise for leader use. Additional information about this option is contained in Chapter 7, *Risk Management, Liability and Insurance*.

If you are renting vehicles in the United States, ask the company if they will waive the state taxes if you provide proof of tax-exempt status. You can obtain a letter from the Adventure Travel Programs Manager that shows the AMC's tax-exempt status. Unfortunately, this letter will not waive any airport concessions fee or other taxes.

If leader(s) (i) anticipate using air mile programs for their airfare and (ii) leader airfare will be a trip cost, make sure to document the value of the air miles. A useful proxy is the cost of a comparable air fare incurred by a paying participant. Policy regarding this matter is discussed later in this chapter.

## ➤ **Lodging**

Hotel or campground reservations should be made 8 – 10 months in advance. Costs can be estimated by directly contacting the facilities and from internet websites. Useful websites like Hotels.com and TripAdvisor give fairly accurate rates. You should not count on using guide books as they are often a few years out of date. You should contact the facility directly as you frequently will be able to negotiate group rates and better terms with them. Investigate any/all applicable taxes and charges (there are many in different countries). It is not unusual for rates for the next year to be unknown at the time you make your inquiries. Some facilities will commit to using this year's rates for a group. If not, then estimate what a modest increase might be and include this in your budget. If the hotel is in the United

States, you should ask them if they will waive the state taxes if you provide proof of tax-exempt status.

Most U.S. hotel chains will allow you to hold the group's reservations with a credit card or with a one night's deposit. Non-chain hotels may do the same, but they will usually ask for some sort of deposit, though with fairly liberal cancellation terms. When dealing with overseas hotels, always try and negotiate the price and the deposit deadline. Never accept the immediate deposit that most hotels try for. Instead, propose to pay for one night's lodging six weeks in advance. Use faxes or email to get as much as possible in writing. Also, determine the appropriate amounts to budget for tips.

### **> Meals**

You may take care of meals in a variety of ways. If camping, estimate costs on a per-person, per-meal basis. If staying in hotels or lodges, you may contract directly for meals or estimate on a per meal basis for restaurant meals. Information about prices may be obtained from menus from area hotels and restaurants (your hotel will usually be happy to forward sample menus to you) or you can find them online. The experience of leaders who have led trips to the area may also be useful. The cost of contracted hotel meals is often half the cost of restaurant meals. Factor in tips and taxes into your per person price and indicate what is included in your estimate in your proposed budget.

If group meals are going to be logistically difficult because of the size of the group or the location, consider giving people the budgeted amount of money for a particular meal and have them eat out independently. Make sure to note this on your budget proposal and in the final expense report since, as it is possible that you won't have receipts for all these meals.

### **> Tour Operators and Outfitters**

When negotiating with tour operators and outfitters you need to determine not just the per-person price but also any credits such as "one leader goes free" that may be offered. You may have to ask for such credits in that if you don't ask they may forget to offer it. Such credits are a credit toward the total group expenses and not just to the Leader's costs. They are in effect a different way of pricing the trip and all credits should accrue to the benefit of everyone, participants and leaders.

### **> Leader's Expenses**

Trip leading should be neither financially profitable nor burdensome for the leaders. The Leader and Co-leader's share of the group expenses may be part of the trip costs shared by the participants. However, the leader may not write-off any trip expenses that are not covered for the trip participants (there are some exceptions). See later sections of this chapter for policies on meals and airfare.

Leaders are "on duty" from the time they leave home until the time they return; and they should expect to be reasonably compensated for expenses incurred that are directly related to the trip itself. However, leaders must remain mindful that perception is also important:

actions, words, and appearances should never appear as indulgent or profiteering to participants, AMC's leadership, or tax agencies.

The ATC encourages leaders and co-leaders to travel one day early to the trip starting place, to insulate themselves from travel glitches, to adjust to time zone changes, to familiarize themselves with new terrain, and/or to acclimatize. They may charge to the trip their reasonable food/lodging expenses for the one day they arrive in advance.

Leaders should choose modes of transportation, lodging, restaurants, etc. commensurate with what a majority of participants will be using, and be considerate of the level of service. For example, leaders should NOT choose to stay in the Ritz Carlton, eat at 5 star restaurants, expect to be reimbursed for luxury or excessive beverages, use a higher class of airline service (i.e., business or first class) or take a private limo service (unless there is a cost benefit in doing so, such as sharing the cost of a private car with other leaders or participants). In short, leaders should travel as the majority of their participants travel.

- 1.) For AMC Adventure Travel trips, the trip fee charged to the participants is established through an extensive budget and trip approval process. A typical trip will budget for 5-7 participants per leader. Should the leader opt to run a trip that does not meet that threshold of participants (a small group trip), the leader will only contribute monies should the collected trip revenue not cover all the expenses as they are estimated in trip budget. However, it is important that leaders do not "short-change" participants by providing lesser quality lodging, meals, etc. than described in the prospectus in order to make sure their trip will be completely paid. Refunds will be issued once all trip expenses are paid including covering the leaders' expenses.

## 2.) Participant to Leader Ratios

It is important that leaders be mindful of how much each participant contributes to the leaders' legitimate trip expenses. Leaders and co-leaders are entitled to have their trip costs covered by participants, but leaders should assess the impact this has on the trip's final price. The number of participants relative to the number of leaders, or the participant to leader ratio (PTLR), is a key factor both in terms of each participant's contribution to a fair share of leaders' costs and to other critical trip considerations like risk management or the use of outfitters and guides.

A higher PTLR will allow leaders to spread their trip expenses to a larger number of people while a lower PTLR will cause participants to pay a higher share. The following guidelines should be used to determine the appropriate PTLR. The standard PTLR for an AMC trip is 7:1 (14:2 for a 2-leader trip).

A trip may qualify for a 5:1 (10:2) ratio if it meets one of the following criteria:

1. a backpack
2. a trek
3. sleeping capacity in a single hotel/lodge/hostel
4. permit regulations
5. risk management issues

6. other (leader proposed)

A trip could have a PTLR from 7:1 (14:2) up to 15:1 (30:2) if:

1. the nature of trip allows participants to be very independent (e.g. campground in the US Virgin Islands)
2. an outfitter provides much of the on the ground leadership
3. other (leader proposed)

### ➤ **Other Costs**

You may want to provide participants with guidebooks or maps of the area or purchase them for your trip planning. Guidebooks can often be ordered directly from the publisher at a substantial discount.

You may also want to include some sightseeing costs (such as a half-day bus tour, museum entry fees – entrance fees to cultural sites can be significant). If you hire a guide service, you will be expected to tip – ask the local outfitter what is normally expected.

Administration costs vary considerably, and phone calls and postage costs may add up. Phone charges can be reimbursed for international calls made during trip planning and for international or foreign in-country voice, text and data charges during the trip by either purchasing a temporary international service plan from your carrier or buying a “go phone” card upon arrival overseas. Also factor in copying costs for the trip prospectus, application, and for trip mailings to the participants. These days you can avoid paying postage by sending materials and communications by email to most participants, but you should still budget at least \$50 for miscellaneous administrative costs. If you are technically savvy you can even set up a website for your trip that has a description and all applicable forms. Leaders should use a copy service such as Staples so that a receipt can be obtained.

If you are doing a camping trip, you may need to purchase supplies such as coolers, charcoal, and paper plates locally. For backpacking trips, you will need to either mail your gas stoves or rent them where you are going. You should not send fuel but should buy it locally. Consider what those costs may be.

### **Communication Devices:**

1. All AT leaders must carry cellphones on all trips. This facilitates participant to leader, leader to leader, and leader to emergency services communications. On international trips an international data plan, a SIM card, or the purchase of a local phone are all legitimate alternatives. It would be helpful, but not required, if one of the leaders had a smartphone with internet capability.
2. In some domestic situations leaders may also choose to carry two-way radios (walkie-talkies) for leader to leader communications.
3. In areas where cell phone coverage is unreliable, it is recommended that leaders also carry a satellite communications device. On an outfitted trip, guides should have all necessary communication devices, including a satellite communications device if appropriate.

4. AMC maintains an inventory of satellite communication devices for use by leaders. If devices are not available from the AMC, they may be rented.
5. All reasonable communications-related expenses including minutes used on AMC-owned satellite devices are legitimate trip expenses and should be budgeted for.

**Satellite communications devices:** As of 2017 there are two types available:

- Satellite phone - voice communications, easier to use, slightly heavier, more expensive/minute
- Satellite communicator (e.g. Garmin InReach) - two-way text communications [use in conjunction with a smartphone recommended] and emergency button. Slightly lighter and less expensive per minute.

**Note:** Review the emergency service protocols described elsewhere in the Leader's Handbook.

If you are traveling to a foreign country, you will incur foreign exchange conversion fees. The AMC has a relationship with TD Bank which provides the following cost-effective services:

- The TD debit card when used to purchase foreign goods or services does so with no foreign transaction fees.
- The TD debit card when used at an ATM withdraws foreign currency with no foreign transaction fees but with an ATM convenience fee typically in the range of three to four dollars.
- Wire transfer fees from your TD Bank account are charged with a 1 1/2% foreign currency exchange fee that is embedded in the exchange rate at which the transaction is processed.

You are encouraged but not required to use the TD Bank account and debit card for all transactions. For international travel, you may wish to use a different credit/debit card that also does not incur foreign transaction fees.

A pre-trip meeting to get acquainted and answer questions is recommended – remember to allow for costs of such things as beverages and desserts. You may also want to plan a trip reunion and allow for those costs as well.

You should always have an overall contingency fund since you never know what may happen to raise costs or what unanticipated costs may occur. The recommended amount of contingency is a range between a minimum of 4 to 8%. Some leaders figure a “worst case” cost (where everything costs the maximum estimated) and allow an additional 5% contingency fund. In cases where estimates are very uncertain, a larger contingency provides greater peace-of-mind.

You should also include a separate contingency to allow for the fact that the foreign exchange rate may change by the time the trip takes place. Remember for every cost item that is a non-US dollar currency that **exchange rates fluctuate**. Future exchange rates are unknown. You often do your trip costing one-year in advance and you must allow for changes and make sure to budget enough contingency. Such costs items should be recorded in the original currency. You may be able to set up a chart or spreadsheet with the exchange rate as a parameter. Then by varying the parameter you can see what the impact on the trip cost is and include an appropriate exchange rate contingency in the advertised trip cost. It is better to give a refund *after* a trip than to request additional funds from participants.

Emergency medical and evacuation insurance is required on all trips. The fees for this insurance depend on the destination and length of the trip. These fees may change from year to year, consult the AMC-AT Leader website for an updated list of these costs which are at the bottom of the Roster of Insureds form (see [Appendix K](#)) or contact the Adventure Travel Programs Manager with any questions.

Lastly, but very importantly, the AMC-AT program is self-funded, so each trip incurs AMC-AT program expenses at 20% of total costs, except air travel on scheduled commercial flights, the overall contingency fund and the emergency evacuation insurance. A commercial ferry to move the trip from one island to another would also be exempt if it is ticketed in advance and paid for like an airfare. Since the percentage may change, check the trip expenses section of Chapter 6, *Financial Information*, for the percentage currently in use.

### **Constructing a Trip Budget**

A budget that supports the proposed trip cost must be submitted to the AMC-ATC together with the trip proposal. The budget should:

- ☐ Include all anticipated trip costs including those described above
- ☐ Show how the trip cost is derived from the individual cost items
- ☐ Include calculations for at least the minimum and the maximum number of participants. The trip cost should be based on the higher result.

A form for constructing a budget is included in [Appendix E](#). Including additional detailed information and notes on the components of the budget is strongly recommended.

When a trip proposal is approved the associated budget is also approved. If you anticipate any unusual expenditures these should be included in the budget and explicitly identified. Then when the budget is approved such expenditures are also approved. You do not want to be in the situation where the AMC-AT Treasurer disallows an expense as being inconsistent with AMC-ATC policies as it then becomes your personal expense.

### **Policy on the Cost of Leaders' Meals**

Under normal circumstances, the group eats together whether it is the whole group or the group is split into subgroups to suit local conditions.

- If the participant's meal is covered, the leader's meal is covered.

- Leaders are always “on duty” during a trip. A general guideline is that if roughly 2/3 of a mix of the meals (breakfast, lunch, and dinner) is covered by the trip, a leader can be reimbursed within reason and commensurate levels of service for their meals during trip.
- Leaders should submit receipts for expensed meals, using discretion in claiming appropriate meal costs. Meals should never be extravagant, should be at establishments that are commensurate to what other participants use.
- Meals taken enroute to the airport or at the airport during lengthy waiting periods can be expensed, again using defensible leader discretion for class of service and subject to review if it appears excessive.
- If leaders take meals separately from the group to discuss emergent trip business this is considered a trip expense and is eligible for reimbursement. (This circumstance should not occur on the vast majority of trips.) Conversely, if the leaders take a separate meal to “take a break,” this would most appropriately be at the expense of the leaders.

Leaders need to state meals that are included in the prospectus and describe it briefly in their trip notices, prospectus and other marketing materials (i.e., most meals or breakfasts and dinners, etc.).

### **Policy on Airfare Costs**

**Carefully weigh the advantages and disadvantages of including airfare as part of your trip budget. If you wish to include the cost of your own airfare, you must adhere to the steps outlined in the policy for including leader airfare, regardless of whether you organize the air transportation or allow your participants to make their own arrangements.**

#### **Advantages of including airfare in the advertised trip cost**

- ☐ It is a nice service to provide, especially for people who do not do a lot of travel.
- ☐ For international flights, group air reservations may be flexible in terms of payment deadlines and may be cheaper. For instance, you may only have to put down \$100 per person until 30 days before the flight, and you may not have to give the airline a final list of names until 45 days out. All you have to do is make people responsible for getting to and from one central location (i.e., NY for European trips, Los Angeles for Asian and South Pacific trips, or Miami for Latin America).
- ☐ For both domestic and international flights, you can control when people arrive and leave. This is especially important if your first night is spent far from the airport and you cannot have people arriving at random times.

#### **Advantages of not including airfare in the advertised trip cost**

- ☐ Air travel can be complicated, especially if you are not familiar with the terminology and options (i.e., group airfare, consolidator, class of service, etc.).
- ☐ Marketing might be initially easier as the reduced trip cost will be comparable to other advertised trip costs to the same destination.
- ☐ People have the flexibility to shop around, use their frequent flier miles, and have the freedom to choose other travel dates or add destinations. The chance that people will arrive at random times is reduced if you have them add destinations after the group trip.

- Group airfares typically require a minimum of 10 participants leaving from one or two central locations (i.e., Boston/NY). Despite their flexibility, they may not always have the best fares or be available to some destinations.
- Participants may not live in the Boston or New York areas and it may be very inconvenient and expensive for them to get to the group's designated originating airport.
- The air industry is in a state of flux and including air could make some trips more vulnerable if there is a major problem, such as a bankruptcy.

If you wish to include the leaders' airfares as part of the trip budget, so that participants contribute toward the cost of the leaders' airfares, but you do not actually purchase the tickets on behalf of your participants, you must follow the procedures below. Note: coverage may not exceed that allowed by the limitations on leader's expenses (See above and use the same formula as for land costs).

- Leader researches appropriate flight options and communicates this to all participants.
- Leader provides precise requirements for arrival and departure to participants.<sup>9</sup>
- Leader provides a preferred flight schedule. Wherever possible, the final flight should be from a hub accessible by using the same airline from all airports convenient to most AMC members.<sup>10</sup>
- Leader provides contact information for recommended airlines or a travel agent that can book the flights. Based on conversations with the airlines/travel agent, the leader recommends when reservations should be made.
- Leader follows up with each participant to verify they have indeed booked their flights and that the flights they have chosen are adequate for the trip plans – this point will be time sensitive and will vary depending on the trip details.
- Leader provides a contingency plan for anyone who may have flight problems.<sup>11</sup>
- Leaders must book a class of airline service equivalent to what the majority of participants will use (generally, economy coach class). Airline charges such as checked first bag fees or seat selection fees would be reimbursed. Seat selection fees should fall within a range of \$25-50. If leaders choose to purchase economy plus or an upgraded class of service including exit row, bulkhead, or extra leg room seating, the incremental cost over the economy ticket price will not be reimbursed. A screenshot of the economy coach class ticket price should be submitted along with the ticket receipt in the final report.
- Leaders' travel expenses to and from home the home airport can be reimbursed. Leaders should use good judgment in choosing the means of transportation to and from airports, using modes (or basing cost recovery on means) commensurate with trip participants.

---

<sup>9</sup> E.g., Arrival: You must arrive in Anchorage, AK before 1:30 pm on Saturday, July 5, 2003. Vans will be departing the Anchorage airport at 2:30 pm July 5. Departure: Flights can be scheduled any time after 11am on Monday, July 28, 2003. We will be dropping off the vans at the Anchorage airport at 9am on July 28.

<sup>10</sup> E.g., Arrival: AK flight 77 arriving Anchorage at 1:18pm, Saturday, July 5, 2003. Departure: AK flight 78 departing Anchorage at 11:23 am, Monday, July 28, 2003

<sup>11</sup> E.g., First night will be at Anchorage hotel allowing for any problems with delayed or cancelled flights or delayed luggage. Details on where the group will be staying, and transportation options should their flights be late or cancelled.



## **Use of leader's airline points to buy airfare**

- Because leader requests for cash reimbursement for plane tickets purchased with frequent flier miles are unusual, and because of the potential that such requests might not adequately protect the financial interests of trip participants, all such requests must be approved in advance by the ATC treasurer, or in his/her absence, the chair. Requests will be approved when in line with the costs of reasonable itineraries likely to be chosen for cash purchase if use of miles were not a factor.

## **Leader "Layovers" Between Trips**

If leaders stay in the country, or region between trips, their reasonable expenses for the short interim period of up to approximately a week may be covered by the trips in lieu of and up to the cost of the round-trip airfare saved. Reasonable expenses include items such as hotels, meals, transport and incidentals for an interim period at a level of service and/standard similar to that of the trips(s). The initial trip(s) proposal budget basis should be as if the leaders were flying round trip from their US residence (as per "normal" procedure). Ticket savings should be documented by means such as screenshot copies or quotes of airline ticket fares at the time of booking the trip at a class of service similar to the participants. This, along with documentation of the inter-trips costs claimed will be part of the final trip finance report for the trip. The variety and details of specific scenarios are hard to predict; within this policy, or approach framework, specific scenarios will be addressed on a case by case basis by the trip approval and review sub-committees, treasurer or executive committee with the trip leaders), as is appropriate.

## **Policy on Trip Extensions**

Some trip participants choose to extend their stay in the area of an AMC Adventure Travel (AMC-AT) trip by arriving before or staying on beyond the dates of the official AMC-AT-approved trip. Trip Leaders need to be very clear in their prospectuses, advertising, and contacts with potential participants that any suggested or mentioned extensions for before or after a trip are outside AMC's sponsorship unless they were included in the trip proposal that was approved by the AMC-ATC.

Official AMC resources other than the prospectus should not be used to describe non-AMC-approved trip extensions. That is, such extensions should not be mentioned in the trip notices that are published in AMC Outdoors or on the AMC's outdoors.org website.

The AMC-AT trip Leaders should not make pre- or post-trip arrangements for participants nor should they handle the funds for any such arrangements. Leaders should advise participants interested in trip extensions to directly contact the vendors or outfitters.

Examples of appropriate text for prospectuses follow.

### **Sample prospectus language about trip extensions not sponsored by the AMC.**

XXXXX is far away and expensive to reach. While some of us will come directly to the trip and go directly home afterward, we expect that others may take this opportunity to travel to other [regional] attractions, on their own, outside the sponsorship of the AMC. Those doing so are acting on their own and must recognize and acknowledge that such an extension is outside the AMC-approved trip, and as a result, the AMC takes no responsibility related to that travel and the associated risks. The official trip dates are XXXX to XXXX, including

travel days for those coming and going directly to and from the trip. Be aware that the AMC-included Medical and Evacuation insurance coverage is only valid while you are participating in the AMC trip. You should consider purchasing additional insurance if you will be participating in a non-AMC-sanctioned extension.

The attractive possibilities to further your presence in the region are extensive. [Describe such.] The foregoing is intended only to help you in planning your activities and must be read in the context of the first paragraph of this section.

**Sample prospectus language about extensions to a trip to Patagonia.**

South America is far away and expensive to reach. While some of us will come directly to the trip and go directly home afterward, we expect that many of us will take this opportunity to travel to other South American attractions, on our own, outside the sponsorship of the AMC. While some may opt to include such additional travel while in South America for this official AMC Adventure Travel trip, such an add-on is outside the AMC-approved trip, and as a result, the AMC takes no responsibility related to that travel and the associated risks. The official trip dates are Feb 25 to March 11, including travel days for those coming and going directly to and from the trip. Be aware that the AMC-included Medical and Evacuation insurance coverage is only valid while you are participating in the AMC trip. You should consider purchasing additional insurance if you will be participating in a non-AMC-sanctioned extension.

If you are interested in seeing cities, you will be passing through both Buenos Aires and Santiago, at least, and possibly others. Punta Arenas, which is on the Straits of Magellan and near Cape Horn, is a departure port for excursions to Antarctica. Ushuaia, to which you could fly between Buenos Aires and El Calafate, is almost *at* Cape Horn, and is also a base for Antarctic excursions.

Some of the major air routes between the U.S. and southern South America pass through Lima, Peru, which is the obvious starting point for visiting Cuzco and Machu Picchu, and/or the Amazon rain forest. Quito, Ecuador, is the starting point for excursions to the Galapagos Islands.

The attractive possibilities are extensive

**Example Itinerary**

The following is an example itinerary. The purpose is to identify all of the components of the trip that may result in costs. One needs to identify all accommodations, meals, transportation, activities, etc. whose costs are to be included in the trip budget. See also the various categories of expenses that are listed in the first section of this chapter.

Summary Itinerary: Backcountry Skiing; March 12 to 19

Day	Travel	Activity	Lodging	Meals	
				Incl.	Excl.

1 Sat, 3/12	Fly to Gunnison Ground shuttle to Crested Butte	Travel In-town tourism Dinner and trip briefing	Hotel	D	B,L
2 Sun, 3/13	None	Equipment review and gearing up Shake-down ski tour In-town tourism Food shopping	Hotel		B,L,D
3 Mon, 3/14	None	Ski in to/set up huts Backcountry skiing, with guides	Huts	D	B,L
4 Tue, 3/15	None	Backcountry skiing, with guides	Huts	B, L, D	
5 Wed, 3/16	None	Backcountry skiing, with guides	Huts	B, L, D	
6 Thu, 3/17	None	Backcountry skiing, with guides	Huts	B, L, D	
7 Fri, 3/18	None	Backcountry skiing, with guides Ski out to CB Dinner and good-byes	Hotel	B, L	
8 Sat, 3/19	Ground shuttle to Gunnison Fly home	Travel	Home		B,L

# Chapter 4

## Communications

---

### **Trip Publicity**

***The Trip notice in AMC Outdoors and on the AMC website, [outdoors.org](http://outdoors.org):*** One of the primary media for informing persons of an approved trip is the AMC Adventure Travel section of *AMC Outdoors* magazine, which is published by the AMC quarterly and on the AMC official website, [outdoors.org](http://outdoors.org). We strongly suggest using the advertising template ([appendix Y](#)) to submit your listings. Two forms of notices should be submitted when a leader submits a trip proposal 1. the magazine listing consisting of 50 words maximum not counting the trip title, dates, price, or trailing contact information that begins with “For details contact...” 2. web listing consisting of up to 450 words and a photo. The magazine listing will appear after the trip approval and remain in the magazine until the trip date, as space permits. The web listing will be on the website after the trip approval until the trip date. The trip status (open, wait-listed, or full) can be changed quickly on the website, whereas the magazine may continue to publish the trip for at least another month or two after it is full. Samples of notices can be reviewed in the AMC Adventure Travel section of *AMC Outdoors*.

**Getting the Notices to the Trip Notice Coordinator:** Please send your advertising template to the Trip Notice Coordinator and the AT programs manager at the time the trip proposal is submitted. This is so that your notice can be put in queue for publication. The Trip Notice Coordinator will reject any notices that exceed the word limits. If such a rejection causes an important deadline to be missed, the Trip Notice Coordinator may edit the notice. If this happens, aspects of the trip that you consider important may be edited out. Hence, you should be sure that your notices are kept within the limits. Notices that fail to accompany the application or that require a change, must reach the Trip Notice Coordinator by the 1<sup>st</sup> of the month, two months prior to publication; e.g., September 1 for the November issue of *AMC Outdoors*.

**Rules for trip notices:** When you submit your proposal, the magazine listing will appear in the first issue after the trip approval. You may also submit a revised trip notice if details about the trip change. Changes on the AMC website can be made quickly – you can change the status of your trip to (F) for Full or (W) for Waitlist. A trip will remain in the magazine even if it is full or waitlisted. Leaders are responsible for getting changed trip notices directly to the Trip Notice Coordinator and program manager.

- **50 Word Short Notice** – Details to include are: overview of the trip, level of difficulty, a major highlight, technical qualifications (if any), type of accommodations, etc. Please make sure not to include language that could be construed as discriminatory, such as “for younger members.”
- **450 Word Web Notice** – This notice is important and is an opportunity to sell your trip in more detail. Concentrate on arousing interest and curiosity about your trip,

while also giving important details. This notice is your major advertising tool. It is also important to include a photo and your leader bio and photo.

## **The Trip Prospectus**

The prospectus is both a sales tool and a contract. The prospectus, as added to or amended by subsequent mailings, is the “contract” describing what the trip will give the participants. It should set clear expectations of the trip, including the role of the Leaders. Send a copy of your trip prospectus by email to the Adventure Travel Programs Manager and the Webmaster/Trip Notice Coordinator when it is complete.

The purpose of this document is to inform potential participants of the trip itinerary, daily time schedule and activities, lodging, meals, travel preparations, required equipment and gear, costs, and risks associated with the activities. Clearly explain the difficulty and strenuousness of the activities and the risks to participants so they can make an informed decision on whether they are capable of participation. Include information such as the distance you will be from definitive care, the difficulty of the conditions and terrain, and the challenge level of the activities. Please see [appendix T](#) and [appendix U](#) for standard prospectus components and standard prospectus language. Please see [appendix V](#) for trip rating system. There should be a caveat that plans might have to be changed at the last minute. There should also be a section about the Leaders.

The least expensive way to get the trip prospectus to participants is to have it available in an electronic format (MS Word or PDF) to email to them. You can also have it posted on the AMC’s website and refer people to that link.

Since this is your principal marketing tool, add pictures and maps whenever possible to give people a direct impression of what they might experience. If you don’t have your own pictures or maps, the internet is a useful place to find them. Just be aware of copyright permission, and make sure to cite your graphics accordingly.

Topics to include in the trip prospectus are below and there is also a list in the handbook under [Appendix U](#) (standard prospectus components) that lists all the topics that should be included. You can also find suggested standard language in the handbook under [Appendix T](#) or [here](#). Please note that the use of the language is encouraged, but leaders are free to adapt to their own specific needs:

### **➤ Trip Information and Logistics**

#### **General Introduction**

This should include a description of the type of trip being conducted (for example, backpack or ski tour) and some comments on the merits of the excursion (for example, the beauty of the area to be visited and the thrills to be experienced). Include the size of the trip as authorized by the AMC-ATC, i.e. 12 – 18 persons and the trip rating (see [appendix V](#)).

#### **Transportation**

If you are organizing airline flights, as much information as possible should appear in the prospectus. If the participants are to make their

	<p>own reservations, you should give them some guidance in making their arrangements. If you expect to have your travel costs reimbursed, you must make the travel arrangements for the group or provide them with detailed instructions of how to do so (see Chapter 3 on the airfare policy). People often ask to extend overseas trips. Discuss your policy on “deviations” here. It is desirable to have all participants arrive at the trip destination together.</p>
<b>Accommodations, Meals and Local Transportation</b>	<p>Misunderstandings about accommodations can cause significant problems on trips. Tell participants exactly what to expect, especially if accommodations will be primitive (include information on beds, linens, bathrooms, telephone, and internet availability). Can participants have a single room on all or part of the trip and at what extra cost? Will they be expected to share a tent? Will more than two people need to occupy a room? State that the leader has the right to change roommates.</p> <p>Include basic information on how meals will work. Which meals will be included? Will people eat as a group? Will participants be expected to help with meal preparation?</p> <p>Describe how the group will travel: will rented vehicles be used, public transportation, or a chartered bus with driver. Will the trip leaders or some volunteer participants need to be drivers? If so, see the policies for drivers in Chapter 7 and the implementation steps in Chapter 2. Participant drivers will need to be informed of these policies and will have to consent to having their Motor Vehicle Records checked,</p>
<b>Educational Goals</b>	<p>Include information on the educational and conservation goals and activities involved in the trip. These goals may include skills development, cultural or natural history, or environmental issues of the trip destination. Explain whether these aspects of the trip will be led by the leaders or by local experts. On some trips each participant is asked to prepare a 10-minute talk on cultural or historical aspect of the area visited.</p>
<b>Local Guides</b>	<p>If applicable, your prospectus should describe the role of outfitters, local guides, and/or local experts on wildlife or culture. Give them a link to the outfitter’s website (if applicable).</p>

## ➤ Cost, Payments and Refunds

<b>Cost</b>	<p>You should state the trip fee and tell participants what it does or does not include. Explain exactly what is included in the trip price: airfare, transfers, accommodations, guides, etc. You should also indicate whether meals are included (if any), and whether any beverages will be included with meals. Also, point out that certain things are not included (personal expenses, unscheduled sightseeing,</p>
-------------	--

	<p>and needs enroute to the starting point). This will eliminate a good deal of haggling and confusion. You should also state that there is an additional fee for non-members. This fee should be an amount at least equal to the AMC annual membership fee which is currently \$50.</p> <p>Participants should understand that they are paying directly for the trip and that no profit is being made by AMC Adventure Travel or AMC. While unforeseen escalations in costs including airfares must be passed on to participants, they will also receive a partial refund if the trip ends up costing less than expected.</p>
<b>Leaders' Costs</b>	<p>The prospectus should include a statement indicating that all, or a portion of the Leader's and Co-Leader's expenses for the trip, and administrative costs in organizing the trip have been included in the overall trip costs.</p>
<b>AMC-AT Program Expenses</b>	<p>The prospectus should state that there is an AMC-AT program expenses fee that is applied to all land and/or water costs of the trip and that this is included in the overall trip cost. The fee is not applied to the airfare portion of the trip costs. This fee covers insurance costs and the shared costs of running the AMC Adventure Travel program. It is not advisable to mention exact numbers or percentages as these may change.</p>
<b>Deposits</b>	<p>You should state the amount of the participant deposit, what part of the deposit is not refundable, and the dates that subsequent payments are due. The deposit should be large enough to show that the applicant is committed to participating in the trip (anywhere from \$100 to \$400 or more, if necessary). You can make needed down payments or hold reservations with the money from this deposit. All deposit checks should be made payable to AMC and deposited in an AMC bank account (see Chapter 6). If monies are not received on time, it is often necessary to send a reminder to the participants.</p>
<b>Schedule of Refunds after a Cancellation</b>	<p>Participants should be made aware that if they choose to cancel, their payments will be returned only to the extent that this return will not raise the cost of the trip to other participants. If possible, based on the refundability of the deposits you have to make to the vendors, include an estimate for the amount of money that may be available for refund for cancellations made before the trip begins. There should be a non-refundable portion of the deposit. Your prospectus should clearly state that a cancellation may result in no refund. See Chapter 6 for a more detailed discussion of cancellation clauses. You should recommend trip insurance (especially for high cost trips), if cancellation becomes necessary.</p> <p>Participants should also be given a go, no-go date to cover the possibility that the trip may have to be cancelled because of</p>

	<p>insufficient sign-ups. This date should be early enough so that those who have signed up can arrange an alternate vacation. In the event that an entire trip is cancelled, the full deposit must be refunded to those who have signed up. If it becomes apparent that the trip will be significantly smaller than that authorized by the AMC-ATC, call or email the AMC-ATC Chair and then advise all the trip participants. Participants must not be penalized if they drop out because the trip is no longer the group experience advertised in the prospectus.</p> <p>It is important to provide information about travel insurance to cover expenses that will not be reimbursed due to cancellation or interruption. You should indicate that emergency medical and evacuation insurance is included in the trip fee.</p>
<b>Airfares and Ownership Of Tickets</b>	<p>Most low-cost tickets come with a substantial penalty for changing or cancellation. Tell participants approximately when you will purchase the tickets. Explain that once purchased, the ticket becomes the responsibility of the participant in the event of cancellation. You may wish to obtain the person's credit card number for directly charging the airfare. This practice can benefit the buyer if there is trouble. (See also Chapter 6).</p>
<b>➤ Participants</b>	
<b>Requirements</b>	<p>The physical ability, experience, and skills required of your trip participants should be stated clearly. You should list the suggested equipment and indicate which items are essential. It should be clear whether the participants will be expected to perform various duties during the trip, such as helping with the driving or meal preparations.</p>
<b>Medical Precautions</b>	<p>You should inform participants if physical examinations or immunizations are necessary. Participants should be advised if this requires a series of shots over a period of several months. In addition, participants should be informed of any additional or "extraordinary" insurance coverage that they might be required to have. If you are not sure what immunizations they will need, consult the Center for Disease Control website (<a href="http://www.cdc.gov">www.cdc.gov</a>) or the World Health Organization's (<a href="http://www.who.org">www.who.org</a>)</p>
<b>Risks Involved</b>	<p>You should clearly state any risks involved in taking this trip. This could range from weather and trail conditions, to altitude sickness and wildlife encounters. If you are going to a country that has any political instability, this also needs to be stated. You should prepare participants and address how you plan to deal with any concerns. For example, if there is a potential for bear encounters, state that you will be going over bear safety techniques and carrying bear spray.</p>



<b>Special Instructions</b>	Information regarding weight limitations on personal gear, packing instructions, and baggage handling should be included.
<b>Pertinent Publications</b>	Participants need to know what maps and guidebooks they may wish to get and the sources of such material, unless you plan to purchase them for all trip participants. Also list other publications that may be of interest.

## ➤ Leaders

<b>Leadership Resume</b>	<p>Include a brief resume of the Leader and Co-leader's relevant leadership and AMC experience to help potential participants understand that experienced volunteers will be leading the trip. Include information such as trainings and certifications (wilderness first aid, CPR), outdoors skills, experience working with groups, and other relevant professional experience.</p>
<b>Conditions and Responsibilities</b>	<p>The prospectus is the ideal place to set expectations about your role as the Leader and the participant's role in the group. Ideally, the Leader will listen to all participants during the trip and make any necessary decisions then. Strong-minded participants may have several suggestions on how to "improve" the trip in a way that suits their own desires rather than those of the group. If the trip meets the stated objectives, you will get the plaudits – if things within your control go wrong, you rightly get blamed. Therefore, you must function as a true leader! Indicate the responsibilities of the trip participants while on the trip. Encourage each participant to be part of the group and act as a team player.</p> <p>In addition, participants should know what assistance you will provide in case of an emergency.</p>

## **Application, Medical, and Release Forms; the Letter of Acceptance**

<b>Required Forms</b>	<p>Before you make up an application form of your own, review the sample forms on the AMC-AT Leader website. After you have done so, you may craft your own application form to collect the information that you need. This form should request name, mailing and home addresses, home and business phone numbers, email, and membership status. For trips out of the country, request the passport number and the <u>exact</u> name that appears on it. (The air ticket must read the same as the passport on many flights.) <b>The AMC Confidential Health Questionnaire</b> and the <b>Optional AMC Confidential Supplemental Medical Questionnaire</b> forms, which should be sent along with the application, request all necessary emergency contact and health insurance information. The official AMC health forms have been vetted for conformance with HIPA and other laws and hence it is inappropriate to include any medical questions on your application form. You must also send to the</p>
-----------------------	---

participants the AMC's official **Risk & Release and Indemnity Agreement** form. The required forms are in the Appendices and appear on the AMC-AT Leader website. You should obtain the most current forms from the AMC-AT Leader website before sending them out. If you will be using electronic versions of these forms, it is important to use the pdf versions (versus any old versions you might have in Word or other software). Using a pdf allows a participant to print the form as the form should read thus eliminating inadvertent changes or errors due to formatting.

You may also want to know if participants have first aid or medical training (this information can be kept confidential). Use the application form to ask about language or other specific skills that may be needed on the trip. If you need drivers, ask about willingness to drive and any special qualifications and indicate that drivers must agree to AMC-AT driver policies and to have their motor vehicle records checked (See Chapter 7 for these policies and Appendix S1 for the authorization form). Ask which airport is the most convenient (if you are able to schedule people out of multiple airports) and inquire about whether people wish to add time at the end of the trip. Avoid travel variations at the beginning. If you plan to buy tickets using the participant's credit card, ask for the number, expiration date and the name exactly as it appears on the card. Ask about any special equipment that may be required for the trip. Inquire about any previous AMC trip experience and request the names and addresses of AMC leaders for references. The application should state the amount of deposit required, the due date for the trip fee, and the name and address of the person to whom the money should be sent. Also ask about whether a person wishes to be put on a waiting list if the trip is full. The leader should take the completed application forms of participants on the trip for reference.

### **Letter of Acceptance**

Tell the participants that you will send an acknowledgement of receipt of their application. If there is a specific date on which you will select the participants or confirm applications (see Chapter 5 – *Screening of Applicants*), explain when you will do this.

When sending the letter of acceptance, be sure to date the letter and include information about travel insurance. Participants that purchase Travel insurance within 21 days of this acceptance letter can have the 'pre-existing medical conditions' exclusion waived. Keeping a copy of this dated acceptance letter will help us verify the date of acceptance, should they submit a claim for reimbursement on their travel insurance policy.

The letter of acceptance is also a good place to reiterate your cancellation policy.

Finally, you may want to allude to whether you will be doing a pre-trip excursion or social event to get the group together. If you already know the dates, state them in the letter.

### **Creating a Wait List**

If your trip is full, you will probably want to set up a wait list in case you have a cancellation. It may be wise to collect the application form without the AMC required forms or the deposit just, so you have a sense of the waitlisted person's abilities before you contact them about an opening on the trip. On your application form you might also ask people to say how long they wish to be considered for the waitlist.

You should also consider whether or not you wish to update the trip status on AMC's website outdoors.org. If you list a trip as W-waitlist or F-full, you may not get many additional inquiries, which would be a problem if you have a cancellation. Obviously, if you have a surplus of people on your waitlist, it is a good idea to change the trip status so that you don't further disappoint people or have your phone ringing off the hook! However, before you do this you should notify the AMC-ATC Chair and the Adventure Travel Programs Manager. They may be able to set up a second section of the trip so that additional participants can be accommodated.

### **Correspondence with Participants and Vendors**

If your trip is listed several months before it departs, you shouldn't forget about your participants once you have them signed up. In addition to sending them an acceptance letter, you should follow up with emails or newsletters. Feeding them information about the trip and keeping them excited about it is important. You will need to give them more detailed trip information several weeks before you leave (see next section).

Because running an AMC Adventure Travel trip involves a lot of correspondence, you should begin by making lists of persons to contact, information to request, permissions to obtain, reservations to make, and information to pass on.

Timing is very important with correspondence. Set up a schedule that lists when letters should be written and when replies are due. Try to get an idea of what arrangements require a long lead-time. For example, a campsite may be in such high demand that reservations should be made many months in advance. Ask for information from various agencies such as the National Park Service during the off-season (when they have more time to answer queries).

Cut down correspondence with prospective participants by using a detailed trip prospectus. This also lessens the time spent on the telephone because you can refer callers to the trip prospectus. You should have an email, written, or fax copy confirming all reservations that you make over the phone or on the Internet. Fax a copy of any phone conversation and ask for a fax or email confirmation. All replies confirming reservations, prices, deposits, and other arrangements should be carried with you on the trip at all times. For US and Canadian reservations, have a copy of the original check or the cancelled check, if an advance was

sent. Most foreign reservations may be made with a credit card or by using a bank-to-bank transfer. Carry the confirmation from your bank with you and consider faxing it ahead also.

### **Other Trip Information Sheets**

You may have to send out emails or newsletters to keep participants informed of changes that may occur. The final trip information sheet should include the following:

- A reiteration of the planned itinerary with any changes highlighted.
- A restatement of expenses that the trip fee will cover and some of the items that participants will have to pay for separately.
- The minimum amount of cash that should be brought by each participant. Also include information on whether credit cards are likely to be accepted, the availability of ATM machines, and whether traveler's checks will be accepted (if known). Describe when and where money may be exchanged.
- Packing instructions with a list of required and optional clothing and equipment
- Weight limitations on baggage, especially if you are taking domestic flights within another country.
- Information regarding how participants can be contacted in case of an emergency at home (complete itinerary with hotel, lodge, and fax phone numbers). Always give a fax number where a second language is involved.
- Time and place of assembly and directions as to how to reach the first destination (with maps if necessary), should you be separated.
- Information on how the leaders may be contacted in case of an emergency both in the days before the trip and during the trip.
- A trip calendar showing such things as flights, where one should be on a particular day, etc.
- What to do if a participant misses the flights.
- Any additional last-minute information.

The final information sheet may be the only information participants have in hand at their departure. Hence all-important information should be included in it.

### **Pre-Trip Get-Together**

It is strongly recommended that leaders set aside a day or weekend for a pre-trip get together. A strenuous trip requires a strenuous pre-trip. This is helpful in several ways:

- It is an opportunity for further communication – leaders can pass on information to participants regarding the final arrangements, and participants can ask questions they might not have asked during the trip registration
- A strenuous activity will help the leaders gauge abilities and the cooperation of their participants ahead of time. This enables leaders to foresee some of the possible problems in terms of personalities and hiking abilities.
- Participants can get to know each other ahead of time and also select roommates.
- Leaders and participants can organize equipment in advance and participants can learn of any equipment that they might need to purchase before the trip.
- It helps build enthusiasm for the area your group will be exploring.

On the trip proposal form you are asked to note whether you plan to do any activities with your participants before the actual excursion. For liability reasons please make sure to check this box and give a brief description and make sure to have your participants sign the normal chapter waiver if your activity involves any outdoor recreation.

### **Trip Report**

#### **➤ Immediate Report**

As soon as possible after the trip returns, email or phone the Adventure Travel Programs Manager or AMC-AT Chair to check in. At this time, give a verbal or written report on any accidents or problems with individual participants that may generate a letter of complaint.

**If there was a minor accident or a problem with your trip, send a report of this accident or problem to the AMC Travel Programs Manager and the AMC-AT Chair within a week of your return. Any serious accidents or problems should be reported to them as soon as they happen.**

#### **➤ Complete a Trip Report**

Shortly after your return from the trip, AMC staff will email the Leaders a link to an on-line survey about the trip. This survey should be completed promptly by all leaders. This trip report should contain a complete description of any changes to your itinerary, the weather, types of accommodations, local transportation, any permits required, any accidents, difficulties, an evaluation of any outfitters or guides you may have used, your overall assessment of the trip and comments on how you might have improved the trip if you were to do it again. Optionally you may create a written report with this information and email it to the AMC-AT Chair and the Adventure Travel Programs Manager.

#### **➤ Complete a Final Revenue and Expenses Report**

The Final Revenue and Expense Report includes a complete report of revenues and expenses as described in detail in Chapter 6. Both reports should help another leader to lead a similar trip. It is also helpful for you to retain copies of correspondence with hotels, campgrounds, guides, van rentals, etc. so that you can either duplicate the trip again yourself or pass the information onto another leader.

You are strongly encouraged to submit your Final Revenue and Expense Report as soon as possible to the AMC-ATC Treasurer or your trip reviewer. However, you must submit it within 90 days of returning from your excursion. The Final Revenue and Expense Report should be accompanied by all receipts and required checks (see Chapter 6).

## Chapter 5

# Screening of Applicants

---

**It is contrary to AMC policy to exclude members from an activity due to their age, sex, national or ethnic origin, race, color, religion, or sexual preference.**

Applicants for an AMC Adventure Travel trip may be excluded from participating in the trip by the Leaders due to inadequate qualifications or experience, insufficient skills, capacity limitations, previously demonstrated personal incompatibility, unsafe actions, refusal to share community work, or inappropriate behavior. Minors (under age 18) may be excluded unless accompanied by a responsible adult.

You must assess the skills, experience, and physical condition of each applicant to determine whether he/she is capable of engaging in the trip activities you have planned. Applicant screening is essential for both the overall conduct of the trip, and the overall safety and wellbeing of the participants.

It is the joint responsibility of the Leader and the applicant to ascertain that the applicant's qualifications and physical condition are adequate for the demands of the trip. You have the additional responsibility to make sure of the applicant's flexibility, adaptability, and compatibility with the rest of the group. You may also use your pre-trip meeting as a screening tool. Anyone whose participation is denied should receive a full and prompt refund of the trip deposit.

The nature of the trip will determine the depth and extent of screening. A trip to the Virgin Islands is less physically demanding and provides more alternatives for participants than does a two-week backpacking trip in the Rockies. Similarly, a three-week trek in Nepal includes yet another dimension in its requirements for adaptability to varying altitudes, living conditions, and vastly different culture.

The trip prospectus should clearly spell out the levels of the physical activities planned, types of overnight accommodations, eating arrangements, duration and difficulty of each event, ancillary outdoor skills required, and any additional feature which would require specific strength, attitudes, or flexibility on the part of the participants. Self-screening is a good tool. The application form should include questions concerning prior trips and pertinent outdoor experiences, and if appropriate, a request for references who can attest to the applicant's performance in similar activities. The AMC Confidential Health Questionnaire may reveal existing medical conditions. The AMC-ATC requires that you use the approved AMC Confidential Health Questionnaire and Release and Indemnity Agreement Forms. These contain information to help you screen applicants. If a potential participant insists on modifying the Release and Indemnity Agreement Form or refuses to complete either the Confidential Health Questionnaire or the AMC Release and Indemnity Agreement forms, he/she may not participate in an AMC Adventure Travel trip.

If there are any questions about a participants' medical history and how it may affect his/her ability to participate in your trip, there are several resources available to you:

- Ask the participant to clarify his/her medical history and if/how they have managed their injury/illness/condition in the past. Make sure they are *absolutely clear* on the physical requirements of the trip.
- Contact the AMC Adventure Travel Programs Manager who may be able to assist in understanding how a particular condition or injury may affect participation.
- Ask the participant to speak to his/her medical provider about the trip. The AMC Adventure Travel Programs Manager can supply a letter that describes the AMC and the AMC Adventure Travel program, and which can be modified to include the specific requirements of the trip and that must then be signed off by a medical provider

Follow-up telephone calls to applicants and their references (particularly other AMC leaders) can provide valuable input in the screening process. Trips requiring high levels of skill, experience or stamina should be preceded by an opportunity for the applicants to demonstrate their ability to fulfill the requirements of the trip, thereby enabling you to complete the screening process.

Compatibility, flexibility, and adaptability are essential criteria that should be considered in the screening of applicants. The best ways to screen for these factors are to check with leaders of previous trips the person has been on, and to telephone or talk in-person with the applicant.

**You and your Co-leader should discuss and put in place back-up plans, in the event that a participant, despite careful screening, is unable to keep up with activities or interface successfully with the group and program, once the trip is underway.**

Screening applicants is never an easy process, but one should keep in mind that the more complete the screening process, the more likely that the trip will be a positive experience for the individual, the group as a whole, and the Leaders.

Contact the AMC Adventure Travel Programs Manager or the AMC-AT Chair with any questions related to screening and/or if you have any challenges in regard to screening participants.



## Chapter 6

# Dealing with Trip Funds

---

As the trip leader, you are in charge of all aspects of your trip, including the handling of trip funds. You are responsible for establishing costs and payment schedules, negotiating with hotels, agents, airlines, etc., and you are the caretaker for the funds paid by the participants. You have a fiduciary responsibility to the participants and the AMC to safeguard these monies and maintain clear and concise records. If responsibility for funds or record keeping is delegated to the co-leader, the leader is still responsible. The following will cover the orderly process for handling the finances of an AMC Adventure Travel (AMC-AT) trip.

You have previously established a trip cost (based on the budget – see Chapter 3) for use in your trip proposal, for publication in *AMC Outdoors*, and in your trip prospectus. This cost includes the excursion operating and set-up costs, a share of the leader's costs (if applicable), the AMC-AT program expenses fee, and an amount for contingencies. The next step is to set up an orderly procedure for collecting, depositing, disbursing, and accounting for trip funds.

### **Bank Accounts**

**Banking Policies:** The AMC Adventure Travel Committee (AMC-ATC) has adopted the following policies for the handling of trip funds entrusted to Leaders by trip participants:

- A. Funds for AMC-AT trips must be maintained in an AMC bank account and separate from any personal funds.
- B. All AMC-AT accounts must be insured accounts. For national banks and savings and loan institutions the Federal Deposit Insurance Corporation (FDIC) provides the insurance. For credit unions it is the National Credit Union Share Insurance Fund (NCUSIF). There also are state banks and state insurance organizations. In these uncertain times we prefer FDIC insurance.
- C. The account name must include both the AMC's name and the Leader's name and be identified with AMC's tax ID number (Tax ID = 04-6001677).
- D. Signing authority on the account must include an AMC Corporate Officer in addition to that of the individual leader.
- E. The opening of any AMC-AT leader bank account must be coordinated with the AMC-AT Programs Manager at Joy Street.
- F. All changes to bank accounts (names, signatories, etc.) must be coordinated with the AMC-AT Programs Manager.

**Foreign Exchange Transaction Policies:** Trips to destinations outside the US usually require purchasing and the sending of funds in foreign currencies via wire transfers or bank

checks. It may also be advantageous to obtain some foreign currency cash before leaving on the trip. Because problems have occurred in some of these transactions, the AMC-ATC has adopted the following policies:

- G. All foreign exchange transactions must be done through an insured bank account. See B. above. Foreign exchange specialist companies that are not banks must not be used.
- H. Transactions must be done only at a date that is proximate to the time when the funds are needed at the destination vendor. AMC, AMC-ATC and AMC-AT Leaders should not be involved in currency speculation. That is, a foreign currency must not be acquired prior to the date it is needed because in someone's opinion the exchange rate is good. Importantly, rate fluctuations are considered in the budgeting process – see Chapter 3.
- I. Currently trip leaders pay for expenses primarily with the TD Bank debit card or checks. Folks also frequently use personal credit cards that are later reimbursed from trip funds. From time to time wire transfers are organized with support of the AMC finance department to pay for large international expenses, e.g. an outfitters' fees for group packages.

There also arises multiple occasions when vendors, usually smaller hotels or transport agencies, want a bank transfer. It can be done through AMC finance, but each transaction is a project for the leader. An alternative is to use a service such as [Transferwise](#) or [Xoom](#). The service works like this:

- Connect the service to one's personal (not possible to connect to the TD account) checking account.
- Enter recipient's financial details. Generally sufficient are the account holder's name and the IBAN, the international banking number which incorporates both bank ID as well as account number. Both items need to be requested from the vendor.
- Decide how much to transfer and push the 'proverbial' button. A few days later the money ends up in the vendor's account.
- Reimburse oneself from trip funds.

The advantages of using a service such as Transferwise are twofold:

- You can do it immediately, on your own timeline.
- The fees are very reasonable. For Transferwise, a transaction involving \$100 costs \$1.60, a transaction involving \$1,000 costs \$7.00. In comparison TD Bank charges, a flat 1.5% commission on all foreign transactions embedded in the exchange rate. Note: a transaction involving \$100 costs \$1.50, a transaction involving \$1,000 costs \$15.00. In the context of a \$30,000 trip budget, the cost difference between Transferwise and TD Bank is negligible

Three cautions:

- TD Bank offers a competitive price for transferring money overseas. The only reason to use a service such as Transferwise or Xoom is personal convenience
- When the money is transferred, it is gone. There is no recovery possible as there is with a credit card.

- Transactions using external services are limited to  $\leq \$2,500$ . Larger transactions deserve the added scrutiny that passing it through AMC's finance department provides.

**Banking Considerations:** If you do not currently have a trip bank account, a bank account in the name of the AMC should be established as soon as possible after receiving trip approval from the AMC-ATC. This account name can be set up as "Appalachian Mountain Club –John Doe Trip Leader," or in a similar form. Having your name on the account helps distinguish your account from other AMC accounts with the same bank, but the name of the Appalachian Mountain Club is *required*. Trip accounts in your own name are *not* acceptable.

All trip funds should be deposited into the AMC bank account and all disbursements should be made from this account. This does not preclude leaders and co-leaders from using their personal credit cards to transact trip business, but all reimbursements of such transactions must be from the AMC bank account. Thus, you will need access to a banking facility or alternate means to make deposits to the account. Also, you need to be able to write checks on the account in order to pay for the trip's expenses, and hopefully to give each participant a refund after the trip. With most banks, this means that you will need to have a checking account. It is not appropriate to use a personal account for these purposes. If you anticipate that you will be leading with the same co-leader it may be convenient for the co-leader to also have signature rights on the account.

The AMC-ATC has established a banking relationship with TD Bank, so you are encouraged to establish an account with TD Bank. To open an account with TD Bank, you should contact the AMC-AT Programs Manager who has the needed forms. TD Bank accounts may bear interest and do not incur any fees. The AMC-AT Program Manager can also establish on-line access to the account for you. A debit/ATM card that can be used while traveling to directly access trip funds may be obtained. The minimum balance to avoid having the account closed is \$0.01 (one penny). TD Bank also provides a bank-by-mail service if a branch office is not near to you. Be aware that TD Bank is an international bank and that the AMC-AT Programs Manager's account has been set up so that she can do wire transfers (domestic and international in both dollars and foreign currencies) from her computer with reduced fees. To initiate a wire transfer, complete the wire transfer request form ([appendix Z](#)) and email to the programs manager with the invoice for payment.

If you do not live near a TD Bank branch, you may establish an account at a more convenient bank.

Because state banking laws differ, you may wish to discuss establishing an account in additional detail with the AMC-ATC Chair, AMC-ATC Treasurer, and/or the AMC Adventure Travel Programs Manager.

***The procedures for opening a new or modifying an existing AMC-AT bank account are:***

- P1. Contact the AMC-AT Programs Manager before initiating any paperwork with a banking institution. Identify the trip(s) for which the account is to be used, an estimate of the amount of funding, and the expected term of the proposed bank account.
- P2. Obtain necessary account opening documentation from the banking institution (new account documents, signature cards, etc.) and complete all necessary information about yourself and any co-leaders who will be signatories. Note that if TD Bank is to be used the AMC-AT Programs Manager already has the paperwork. The name/title on the account must include AMC and your name. For example: Appalachian Mountain Club—John Smith.
- P3. If the bank is not TD Bank, if possible, please arrange for an online banking user ID and passwords for the AMC-AT Programs Manager. If the bank is TD Bank the AMC-AT Programs Manager will make these arrangements.
- P4. When necessary, forward account documentation to the AMC-AT Programs Manager. Additionally, provide the following information:
- Name & Address of Bank
  - Contact information at Bank
  - Names & Address of all leader/co-leader signatures on the account
  - Telephone & e-mail of all leader/co-leader signatures on the account
- P5. The AMC-AT Programs Manager will complete the bank account opening process and forward the papers directly to the bank and make an initial deposit of \$10 from AMC-ATC funds.

All records of transactions with the bank, including deposit slips, checks, and *particularly* bank statements must be retained.

After the trip is over and if you intend to be an active AMC-AT leader and run additional trips in the future, it is appropriate and less effort if you maintain and keep open the bank account for use in future trips. You should maintain accounting records in a manner that identifies transactions by trip.

When you are ready to close your account, you need to first notify the AMC-AT Programs Manager since an AMC co-signature is listed.

### **Timing of deposit of participant checks**

When should a trip leader deposit participant checks? Normally the best choice is when the checks are received because 1) the date of deposit has no impact on insurance coverage 2) checks are safer in a bank account 3) a potentially sticky situation is avoided if a participant cancels after a trip is declared a “go” but before the check has been deposited. Optionally, checks can be held at the leader’s home if there is a large degree of uncertainty about whether the trip will fill or out.

### **The Trip Prospectus**

The trip prospectus that you send out in response to potential participants should contain the overall trip cost. It should clearly describe what is included in the trip price and what is not included. The prospectus is in effect your “contract” with the participants. It is advisable to list your airfare and ground costs separately, especially if you are not arranging a group flight. Also, list the airfare with a range (i.e., ~\$800-950) so that if airfares go up you will still meet the participants’ expectations for what they will spend.

Your prospectus should contain a schedule of payments timed so that you will have enough money to make down payments to agents and outfitters and be able hold reservations. To be sure that you get your desired reservations, an initial down payment (especially for foreign reservations) may need to be paid months in advance. Negotiate with hotels, outfitters, etc. Your supplier may accept the cost of a single night’s lodging a short time before the trip, but you will have to ask for this, they will not volunteer it. The due date of the final payment in your schedule should also be at least 30 days in advance of the time you have to pay the balance due to agents, etc. There are always a few participants who do not pay on time. Unfortunately, phone calls and emails are then necessary. Ask your travel agent when tickets have to be purchased in order to secure the best fare and be prepared to pay on time.

Your prospectus should have an *escalation clause*. You may have figured costs a year in advance and allowed for an increase, although sometimes there is a drop because of currency fluctuations, gas costs, etc. However, for protection of the trip budget such a clause may read as follows: “Although an allowance has been made for increases, it must be understood that any substantial increase must be passed on to you.”

A *cancellation clause* is a vital part of your prospectus. Your agents may have their own cancellation fees. You should make a timely cancellation schedule to protect your budget and provide for shortfalls due to participant cancellations that often occur. The more expensive an excursion, the more detailed a cancellation clause may be required. First, there should be a *minimum* fee of at least \$50 to \$100 and \$200 for more expensive trips regardless of when a cancellation takes place. Then a schedule may read as follows: \$100, if within 60 days of departure and \$200, if within 30 days of departure. Determine what the deadline is for cancellations and what the penalty is from your agents or outfitter. This will help you establish your cancellation schedule. Frequently, there are no refunds if you cancel within a week and certainly nothing for a no-show. Therefore, any cancellation within a few days before departure, and dropouts after the trip has commenced, may not be entitled to a refund. Your prospectus should clearly state that a cancellation may result in no refund. If you purchase airline tickets for participants, you should clearly state to them that – after the non-refundable or restricted tickets are purchased, they own them and if they cancel, they must deal with the airline themselves.

When you accept participants to the trip you should advise them, especially on higher cost excursions, to take out trip cancellation insurance. The AMC-AT Programs Manager will provide you with information on travel insurance upon approval of your trip. There are some exclusions that are waived if the travel insurance is purchased within 21 days of being accepted on the trip. See also Chapter 7 – Risk Management and Insurance, for more details.

### **Cancellations**

AMC-ATC's policy is that a participant's cancellation should not increase or decrease the cost of the trip to other participants or the Leaders. A cancellation occurs when a participant who has been accepted to the trip drops out or does not show up at the trip destination. This may occur for many reasons including health, family matters, or weather events.

**Canceling Person is Replaced:** If a person cancels well in advance of the trip and can be replaced with a person from a wait list then no costs may be incurred other than that for an airline ticket if it has been purchased. Any flight ticket purchased in their name is given to the person and it is their responsibility to deal with the airline for a refund, credit or rescheduling. Otherwise, once full trip payment has been received from the replacement person, a refund of the amounts paid net of the cancellation fee (see above section) may be made to the cancelling person.

**Canceling Person is *Not* Replaced:** If the canceling person cannot be replaced it is recommended that no refund be made until after the trip and the trip accounting has been completed. As always keep careful records of all expenses and for who they were so that afterwards one can appropriately allocate expenses. The details can be complex, and you should consult with the AMC-ATC Treasurer prior to paying any refunds.

The fact that a person does or does not have any trip/travel insurance (AMC's or another vendor's) is irrelevant as to how you calculate any refunds. That is, the insurance is a separate transaction between the person and the insurance company.

The amount to be refunded (after the trip and after you have all of the final numbers) should be based on:

- Same refund of extra funds that all participants get.
- A refund of funds not spent on behalf of this person because they didn't go. This may include food not purchased and eaten (at the average price paid for those that did eat), fees and tickets not paid (a rail pass not purchased in advance, a museum admission, etc.), lodging not paid for (a bunk in a hostel) and the 20% AMC-AT program fee on such amounts.
- They would not be refunded their share of shared costs such as vehicle rental where there then was an empty seat, leader costs, a shared room with an empty bed, and all fixed/group costs.

In brief, you should determine the amount of funds left over (total revenues minus total expenses) and available for refunds. Subtract from this the total amount of costs not incurred (see bullet 2 just above) for all persons that cancelled/dropped out (there may be more than one and the timing may have been different). The remainder is divided by the number of paying participants including those that dropped out/canceled and this is the amount of the "standard" refund to be paid to all paying participants. If you have any questions about the calculations, you should consult the AMC-AT Treasurer.

If the canceling person has purchased trip/travel insurance, they should be in contact with the AMC-AT Programs Manager. Do not tell the person the amount to claim from insurance company until after the trip and accounting is done. The AMC-AT Programs Manager and not the trip Leader will certify to the insurance company the amount of the person's actual loss. The loss will be the total amount paid minus the refunds. Confusion has occurred if

the person claims the full cost of the trip prior to receiving a refund. The intent of the insurance is to make a person whole and not more. The trip Leader should provide information on the relevant numbers to the AMC-AT Programs Manager.

### **Trip Operations**

Before the trip departs, you should have a plan on how to pay for all trip expenses from the trip bank account and how to cover expected and unexpected expenses during the trip. Some expenses may have been prepaid. Some expenses will be paid in cash with funds drawn from the trip bank account. This does not preclude leaders and co-leaders from using their personal credit cards to transact trip business, but all reimbursements of such transactions must be from the AMC bank account. For handling actual cash, two wallets are recommended – one for personal funds and the other for trip funds. You can also withdraw local currency cash from an ATM and pay expenses using a debit card connected with your trip bank account. A financial diary is also advised, as one quickly forgets what was paid for and how much. A small notebook is convenient for keeping a daily log of all expenditures. *If you cannot document where money is spent, you cannot charge the trip for it.* Even small expenditures must be written down. You should have a diary notation, receipt, or separate written note for each of your expenditures.

**Cash disbursements** should be avoided if possible, however in some cases they are required, or are needed for operational expediency. Receipts should **always** be requested for all expenses, especially cash expenses. All items above \$250 **require** a signed receipt for the service rendered from the provider of the service. Examples of these items may include:

- Cash payment for “normal” services such as meals, local transport, hotels, etc. In these cases, the vendor typically provides a receipt as per normal business practice.
- Cash payment to participants for meals allowance, to guides as tips for the trip and other similar expenses. Prepare a receipt for the receiver of the cash to sign; it should denote the date, amount and purpose of the disbursement.

For minor amounts under \$250, such as porters’ tips, taxi tips, etc. where it would be awkward to get a signed receipt from the service provider, the leader should prepare and submit either a hand-written receipt signed by the leader, or a signed spreadsheet with date, amount, and purpose of each cash disbursement.

### **Legitimate Expenses**

As a general rule, any activity or purchase that benefits all participants can be a legitimate reason for disbursing trip funds. For example, cars rented with trip funds should be at the disposal of all. However, the cost of a sailboat rented to take a few people on a side trip should be borne only by those using it. A shuttle bus to transport drivers back from a drop off spot to the trailhead is a legitimate trip expense.

The purchase of token gifts (a memento, T-shirt, or free dinner) for drivers or other volunteer participants who have done extra work for the benefit of the group is a legitimate expense. You should specify in the trip prospectus that it is expected that all participants will help out with food preparation and other group chores without compensation. If you anticipate that some participants will be asked to do significantly more, such as being the

full-time driver of a third or fourth vehicle, their extra efforts may be recognized with a trip fee that is reduced by a couple of hundred dollars. Such an anticipated fee reduction should be included in your trip budget.

A reunion may be considered as a legitimate expense or may be handled separately. Most trip reunions are done as a potluck or pay if you come basis, as those from far away do not want to pay if they cannot come.

When a trip proposal is approved, the associated budget (both the nature of expenses and the estimated amounts) is also approved. All anticipated and any unusual expenditures should be explicitly identified in the budget. This will avoid situations where the AMC-AT Treasurer questions the appropriateness of an expense as being inconsistent with AMC-ATC policies, as it then may become your personal expense.

### **Exclusions from the AMC-AT Program Expense Fee**

The AMC-AT Program Expense Fee is based on a trip's land and water costs, but not airfare or travels to/from the destination (e.g., ferries). This makes AMC-AT trips more competitive with commercial ventures and discourages people from making their own travel arrangements. When the trip visits two or three places, the airfare between these places is also excluded, as is the cost of oceangoing ferries. In contrast, a flight to get canoes to the put-in on a lake would be included in normal trip costs, as would domestic flights that are built into a tour operator's costs.

### **Submitting the Final Revenue and Expense Report**

This Final Revenue and Expense Report form and the other forms mentioned here are available in the Appendices or from the AMC-AT Leader website <https://appalachianmountainclub.sharepoint.com/sites/AMCAdventureTravel-LeaderSite> A two-page summary of Financial Reporting is including in the [Appendix P](#) of this Handbook.

**What is needed?** The Final Revenue and Expense Report must include a complete record of income and revenues received by date and a list of every expenditure, no matter how small, supported by underlying documentation such as a receipt. This report demonstrates that the leaders have been responsible for the funds entrusted to them. A. To facilitate this data collection, you can find several worksheets in the Appendices.

The specific format of the report and worksheets is not important. What matters is that the information is complete, accurate, understandable and well-organized. This benefits both leaders (who have an obligation to show their fiduciary responsibility) and the AMC-ATC Treasurer, AMC staff, and auditors who review the report to verify that you have met your fiduciary responsibilities and that the report is complete and accurate, that all revenues have been accounted for and that all expenses are appropriate and adequately documented.

Trip leaders should already have this information (see recommendations under Trip Operations above and Recording Expenses and Receipts below) and it should be sent to the AMC-AT Treasurer.



You should include the following information at the beginning of your final expense report:

- a. AMC-AT trip number
- b. Trip name
- c. Actual trip dates
- d. Total length of the trip in days
- e. Name, telephone number, and email address for each leader
- f. Number of trip participants
- g. Advertised cost of the trip. If it changed from the original trip proposal, please briefly explain.
- h. Did the advertised trip cost include airfare?

**Recording Revenue:** As funds are received from participants you should record each item on a worksheet and deposit it into the trip AMC bank account. A form for Recording and Depositing Checks can be found in the Appendices. You will find that this form records the information you need conveniently. Some leaders keep a copy of every check with a copy of the deposit slip as the record. A detailed record is particularly useful if a participant questions what payments they have made. It can also be helpful in avoiding excessive bank fees, when you are forced to save up checks and deposit them in batches as some bank accounts limit the total number of transactions per month. Keeping the check record by the individual person or couple, makes it easy to see at a glance which persons are current with payments as the trip time approaches.

The sender of a check will appreciate an email to acknowledge its receipt and also having that check deposited in a timely fashion. However, it is appropriate to hold on to trip deposits and not deposit them into the trip bank account until enough participants have signed up for the trip and you can commit the trip to going. When this is the situation you should still acknowledge receipt of the check and inform them that you are holding the check. Once you have reached the minimum number, the checks should then be deposited. If you do not reach the minimum and after consulting with the AMC-AT Chair and the AMC-AT Programs Manager, the trip is cancelled you should return the checks.

If a tripper cancels before the trip, record any refunds on the worksheet as a negative number. See also the above discussion of cancellation policies.

**Recording Expenses:** As expenses are incurred, you should record each item on a worksheet and put the original receipt in an appropriate envelope to submit with the report. Then check the item off in the trip expense diary. This way, no items will be forgotten. You should request a receipt for every expenditure or create a separate piece of paper for each transaction, such as a gratuity. Place these receipts in a specially marked envelope. For instance, if a driver needs to be paid back for gas, have him/her supply a note with his name, the word "gas," and the amount on it. You should make an effort to get and save an original receipt for every expenditure. In addition, you should keep a trip expense diary/journal. Write every item down as you pay for it. If you think this is too much work and duplication, just imagine trying to account for several hundred dollars that are missing. You neither want to fake the data nor reimburse the trip for the missing funds.

Trip Leaders are expected to submit all original receipts and an Expense Summary which lists every expense with the Final Revenue and Expense Report. Any document that is not submitted must be kept by you for at least 7 years, in case the Report gets audited. In some cases, it is impossible to get a receipt, so it is necessary to create and submit a written record of such expenditures. An original vendor receipt is required for every expenditure over \$250.

**Receipts:** A receipt is a document prepared by the vendor that specifies the total price that the vendor has received from you and identifies what the funds were spent on. Examples of appropriate receipts are the receipt page of a paper airline ticket, the email receipt for an e-ticket, an itemized receipt from a hotel that shows a zero balance, an invoice that is marked paid, or a signed contract from an outfitter that is marked paid. Email invoices and receipts are appropriate records for transactions that are conducted over the internet. Credit card statements and bank account statements are not ideal in that they may confirm expenditures but generally do not specify who or what the expenditures were for. However, for credit card charges that are made in a foreign currency, the credit card statement is an important record that specifies the currency conversion rate and such statements should be submitted with your report in addition to the original receipt in the foreign currency.

Each receipt should be grouped or labeled somehow (A, B, C; 1, 2, 3 or whatever) so that they can be easily matched up with the Expense Summary. This is especially important on international trips where the receipts may not be in English or in US dollars. Only with some labeling is it possible for an auditor, or the IRS, or the AMC-ATC Treasurer to verify that everything matches up. Using the date alone may not work as the date on the receipt and a related credit card statement often aren't the same and either may be in error. Without some grouping or labeling it becomes a time-consuming treasure hunt.

There are cases where receipts cannot be obtained (e.g., taxis and small tips) and in such cases the Expense Summary should contain a note indicating this.

**Leader Contributions:** If you run a small group trip, the leaders may need to contribute to the expenses. Leaders are responsible for expenses that go beyond the total revenue of participant fees. For example, if the total revenue for a trip is \$20,000 (10 participants x \$2000) and the total trip costs including leader expenses is \$20,350 then the leader is responsible for \$350 and the participants do not receive a refund.

**Other Income:** The additional fees paid by participants that are *not* AMC members, net of the amounts forwarded to AMC to obtain memberships for these persons, is recorded on the Final Revenue and Expense Report as a "Guest Fee." The cancellation fees paid by any persons that paid a deposit and *then* cancelled should be recorded as "Other Revenue." You should record the interest your account earns, if applicable, on the designated line. All other incomes go toward reducing the final cost for the participants.

### **Expense Categories**

**General expenses:** Separate your expenses into categories: Transportation, Entrance Fees and Guides, and Hotels and Lodging. By using the same categories when planning, budgeting, and reporting, you will be able to gauge the accuracy of your estimated costs.

Furthermore, your report and this information will be available to others who wish to plan a similar trip and can guide them when they prepare their budget. Use a separate worksheet or worksheet area for each category, and then enter the totals on the summary sheet. You do not need to artificially separate expenses from a single vendor. For example, if an outfitter provides a package price or a hotel includes dinner and breakfast on its bill. Simply list the total expense from that vendor on the Expense Summary. When doing a trip where you use multiple currencies, you may find that separating the expenses into categories makes it hard to verify that the transactions are reported correctly. If this is the case, simply do one large worksheet. (See examples of record keeping worksheets or the *Advanced Record Keeping Sample* in the Appendices.)

**Administrative Expenses:** Make a separate category for administrative expenses. Most people highlight their phone bills and then report the monthly totals for long distance calls attributable to the trip. This is acceptable as is a reasonable estimate. You can record postage expenses, but it is acceptable to list “4 mailings x \$.54 x 20 persons = \$43.20” and to enter \$43.20. If something appears confusing to *you*, it will also appear this way to an auditor. Supply details if necessary but keep the worksheet simple.

**Airfares:** You will need a receipt that details the expenditures for airfares, even if they are charged separately to each person’s credit card. In particular, you will need to establish a cost for the leaders’ airfares, which are recorded in a different place on the Final Revenue and Expense Report form.

### **Foreign or Multiple Currencies**

It is difficult to calculate an exchange rate for every transaction, so you should avoid doing so. An easy and manageable strategy is to create categories for what you spend and keep your receipts in separate envelopes with that expense category on the front. Or, when recording your expenses on a worksheet, list the category.

Different categories could be:

- Cash expenses in US dollars
- Credit card expenses in US dollars
- Cash expenses in foreign currency
- Credit card expenses in foreign currency

If you pay for something with a credit card, the credit card company will give you a rate based on that day’s exchange rate, plus a foreign exchange fee. This total is the amount you should record on your Expense Summary.

While abroad, you may have to pay for some items with local currency. Whenever you cash a traveler’s check or withdraw foreign currency using a debit card, make a detailed note of the transaction. At the end of the trip, you will have a record of the total amount in US dollars that was used to acquire the foreign currency. Use this total in the Expense Summary, rather than converting each expense.

If you use a traveler’s check overseas, you will have to convert it into a foreign currency. Keep track of the commission charged (if any) and record the expense along with any

others. Likewise, if your credit card or debit card company charges you a fee, this is a legitimate expense and should be recorded. The fee will likely be converted into US dollars already.

It is important that the AMC-ATC Treasurer (and possibly an auditor) can follow your logic, so create a comments section after each expense to show how you came up with the final amount in that column. See sample below from a trip to the Canadian Rockies:

The expenses are divided into three groups: foreign currency cash expenses, credit card expenses (in both foreign currency and US dollars), and US dollar cash or miscellaneous expenses.

<b>Canadian Cash Expenses</b>		<i>Canadian \$ cash obtained by cashing traveler's checks at an exchange rate of \$0.90US = \$1.00 Canadian (C\$). Hence \$284.82C = \$256.34US.</i>
<b>Item</b>	<b>Cost in C \$</b>	<b>Comments/description</b>
Gas	\$ 220.82	
Banff Hot Springs Pool Pass	\$ 64.00	11 passes
Subtotal	\$ 284.82	

<b>Credit Card Expenses</b>		<i>All expenses converted to US\$ using exchange rate from credit card statements (copies attached)</i>
<b>Item</b>	<b>Cost in US \$</b>	<b>Comments/description</b>
Lodging Lake Louise	\$ 2,184.00	at C\$34 pp x 13 people x 5 days plus tax
Lodging Banff	\$ 1,195.00	at C\$31 pp x 13 people x 3 days plus tax
Van rental for two vans	\$ 1,707.41	Includes all taxes, insurance and extra driver fees
Car rental	\$ 71.00	Includes all taxes, insurance and extra driver fees
Van insurance	\$ -	Included above
Car insurance	\$ -	Included above
Extra driver fees	\$ -	Included above
Taxes for van	\$ -	Included above
Sunshine shuttle bus	\$ 126.95	C\$12 per person x 13 (one free)
Park permit	\$ 110.98	C\$125
Welcome dinner	\$ 599.56	Bow Valley Grill – C\$608.00
Other meals	\$ 3,675.60	Breakfasts and dinners - C\$4084.00

Note: The US dollar amount should include any conversion/transaction fee that is charged by the credit card company. Some credit card companies may charge these separately.

<b>Other Expenses</b>		
<b>Item</b>	<b>Cost in US \$</b>	<b>Comments/description</b>
Administrative	\$ 50.00	Maps, postage, phone calls – all US dollar expenses

The total expenses are then the sum of the three groups of expenses:

<b>Expense Summary</b>	<b>Cost in US \$</b>
Canadian Cash Expenses	\$ 256.34
Credit Card Expenses	\$ 3,675.60

Other Expenses	\$ 50.00
<b>Total</b>	<b>\$ 3,981.94</b>

### **Submitting Your Report and Refunds**

The Final Revenue and Expense Report and all supporting materials should be submitted to the financial reviewer for approval. Once approved, a check for AMC-AT program expenses and a check for the emergency medical and evacuation insurance can be sent to the AMC programs manager. A single combined check is ok if the separate amounts are clear on the Report form. You must also include your receipts in an organized manner. Trip Leaders are expected to submit all original receipts or a written record for every expenditure when the Final Revenue and Expense Report is submitted. You are required to turn in receipts or invoices marked paid for all expenditures over \$250.

You may submit electronically the Revenue Summary, the Expense Summary, and the Final Revenue and Expense Report and any supporting electronic documents to the AMC-ATC Treasurer and then mail the original receipts for his/her review. Some Leaders have scanned their receipts and transmitted them electronically. Once there is agreement on the numbers, then the original receipts and a check are mailed. Please note: if all receipts and supporting documentation has been scanned and submitted you do not need to send the original receipts to the AT programs manager.

If there are extra funds after all expenses have been paid, the excess should be refunded to the participants. The report should include a table that specifies the Leader's plan for each participant's refund. For most trips the participants share equally. If there are unique circumstances (e.g., a reduced airfare for certain participants that traveled from a different airport) that justify a different refund for some, you should describe this. If some participants extra efforts, such as being the full-time driver of a third or fourth vehicle, are being recognized with a trip fee reduction/larger refund, you should also describe this.

After the financial reviewer has reviewed and approved the Report, he/she will notify the leader of the approval. Only then should any refunds that may be due to the participants or to participants who cancelled or dropped out be sent to them. If the Report is incomplete or unclear the Treasurer will contact the leader for clarification. The check(s) should be made payable to the *Appalachian Mountain Club* and sent with the report no later than 3 months after the conclusion of the trip. If a final report cannot be submitted by the due date, you must contact the AMC-ATC Chair and submit a preliminary Report of Revenues and Expenses with a check. Otherwise you will be considered in arrears and will not be permitted to propose future trips until the problem is solved. Inevitably the causes for a late report are best handled by communicating with the AMC-ATC Chair or Treasurer promptly.

### **Reimbursement of Leader Expenses for Cancelled Trips**

The AMC-ATC does not expect trips to be a financial burden to the Leaders. The AMC-ATC anticipates that you are responsible for placing deposits, making payments, etc. It is your obligation to know when you should cancel a trip due to insufficient sign-ups or political instability in the country, etc. You must take into account the refund schedule from various service purveyors (hotels, outfitters, etc.). See Chapter 2 for a discussion of policies

on canceling an AMC-AT trip and the requirement to first consult with the AMC-ATC Chair and the AMC-AT Programs Manager. Should a trip have to be cancelled for legitimate reasons, it is your responsibility to make full refunds to all participants and to pursue refunds from all parties. The AMC-ATC understands that this is not always possible and has therefore established the following as guidelines.

This expense repayment schedule has been established to minimize down payments and to preclude trips being set up without a good feel that they will run. In general, the greater the shortfall the smaller the percentage that will be refunded to the Leaders by the AMC-ATC.

1. The AMC-ATC will refund the entire first \$200.
2. The AMC-ATC will refund 50% of the next \$200.
3. The AMC-ATC will refund 25% of the remaining shortfall up to a maximum of \$500.00.

It is the trip leader's responsibility to present a request for reimbursement to the AMC-AT Programs Manager.

### **Auditing**

Each year the Club auditors may check a number of randomly selected AMC Adventure Travel trip accounts. For this reason, you should carefully keep completely accurate financial records (with all receipts). All records that have not been submitted to the AMC-ATC Treasurer should be kept by you for at least 7 years

## Chapter 7

# Risk Management, Liability and Insurance

---

Risk is an inherent, but calculated, component of an AMC Adventure Travel trip. We climb mountains, hike long distances, travel in remote locations, and push ourselves to physical and mental limits. Our charge as leaders is to be fully aware of the risks we are taking and manage them in a way that minimizes the potential for harm to members of the group.

### **I. Preparation and Risk Prevention**

Accidents, injuries, and illness may occur on an AMC Adventure Travel trip. It is our responsibility to minimize the potential for such incidents, but also to be prepared for such emergencies. We should plan and facilitate our trips with care, taking all reasonable precautions.

#### **Expectations of AMC Adventure Travel Leaders**

- To thoroughly research a trip destination and the activities planned, taking careful note of the potential challenges and risks the group will face.
- To have the technical skills and experience to lead a group of less-experienced participants during your planned activities.
- To be familiar with the skills, knowledge, and abilities of any guides or tour operators.
- To prepare the group for the challenges and risks they will face: level of physical fitness required, expectations for group cooperation, necessary equipment, required previous experience, review of medical history, information about expected conditions, the location, and access to emergency care.
- To maintain an awareness of the group members both before and during the trip. Keep track of their personal goals, group goals, mindset, physical limitations, concerns/fears, etc.
- To manage the trip by assessing and managing potential risks, ensuring that participants are equipped with activity-appropriate safety equipment, and ensuring that the equipment is used at all appropriate times.
- To respond to any accidents or incidents that take place on the trip in accordance with the leader training you received.

#### **Expectations of AMC Adventure Travel Participants**

- Provide an honest description of physical fitness, prerequisite experience, and medical history.
- Arrive prepared, rested, suitably fit, and with the appropriate equipment.
- Possess a willingness to cooperate with group members and meet group expectations.

#### **Leader Skills & Training**

All AMC Adventure Travel Leaders and Co-Leaders have completed a set of baseline requirements before becoming approved AMC-AT leaders or co-leaders (see Chapter 2). Leaders may need to refresh their skills or learn new skills for a particular trip. Leaders should have a skill level at least equal to, and preferably exceeding, the difficulty of the activity that they are leading. The leadership training programs offer potential leaders the opportunity to gain experience without actually leading. The Club, most Chapters,

and many activity committees offer excellent courses designed to improve both technical and leadership skills. It may also be important to take personal trips in the outdoors to refresh your skills and to challenge yourself in ways that are not possible when leading a group.

## **II. Accidents, Incidents and Emergency Response**

Leaders should always be prepared to handle a minor or major incident on an AMC Adventure Travel trip. If a participant or leader is injured, ill enough to require medical care, or departs the trip for any other reason, please contact the AMC Adventure Travel emergency contact person as soon as possible.

### **Major Incident Response**

If a member of the group becomes injured or ill, these steps will serve as a general overview for how to respond. For a more thorough emergency response guide, refer to the Mountain Leadership School Instructor Manual.

1. **Perform an initial response to the incident.** Assess the scene, stabilize the situation, include steps to ensure the safety of yourself and others, and complete an initial assessment of the patient according to your level of training. Start the AMC Patient Care Form.
2. **Determine a plan** for treating the patient, whether he/she will need to be evacuated to professional medical care. Establish priorities.
3. **Call for help** or plan the evacuation, if needed. Consider factors such as distance to trailhead, time of day, terrain, weather conditions, and abilities of group members. Will you walk the patient out to the trailhead or send a small group for help? If a small group is sent, be sure there are at least 3 people. Unless it is necessary, avoid splitting up the group. Follow AMC Evacuation procedures.
4. If the patient requires medical care:
  - a. **Take them to the nearest adequate medical facility.**
  - b. **Contact Global Emergency Services** provided by **United Healthcare Global** to alert them to the situation and seek assistance. They can help locate physicians, medical facilities, and dentists, if needed.
5. **Call the AMC Adventure Travel emergency contact person** to alert her/him to the situation and seek assistance. Call as soon as the situation is stabilized. Do not wait until you've returned home.
  - **Leader Responsibilities:**
    - a. **Have current WFA/AWFA/WFR etc. and CPR certifications and be comfortable with the skills and knowledge associated with that training.**
    - b. **Be familiar with local emergency resources, such as medical facilities, police, forest service, search & rescue, etc.**
    - c. **Carry the phone numbers for the AMC emergency contact person and United Healthcare Global at all times during the trip.**
6. Document the incident using the AMC Incident Report Form (appendix).

### **Minor Incident Prevention & Response**

There are many "minor" incidents that could take place on an AMC Adventure Travel trip that could affect the trip significantly or negatively. Here are a few lessons learned



from past trips that might help prevent such an incident from having a significantly negative impact on your trip.

***Problem 1. Late Arrival.*** A first-day flight may be late or canceled so that some people, perhaps even leaders, do not arrive on time.

*Prevention.* Have all participants fly to the destination on the same flight. This may be easier on some trips than others but may be best when the group is traveling abroad and could meet in a hub or “gateway” city, such as Houston or New York.

*Accommodations.* All participants should know exactly what to do and where to go on the first night in case of a delayed arrival. It may be best to stay close to the airport on the first night in case of delayed flights or missing luggage.

***Problem 2. Luggage missing or delayed.***

*Prevention.* Participants are asked to wear critical clothing items, such as hiking boots, on the airplane. Any essential personal items may be taken as a carry-on. Prevent theft and displacement on arrival by supplying pieces of colored yarn or flagging tape for all bags. Tell the trip participants the destination code for the airport to which they are traveling and tell them to watch the agent carefully to assure that the correct destination code is attached to the bag (e.g. DEN = Denver, EWR = Newark, BOS = Boston).

***Problem 3. Rental Vans are Unavailable.*** Occasionally, a rental company will not have the vehicle(s) on site that you reserved. Most well-known U.S. companies will have comparable vehicles to rent if such an error is made. Smaller companies or companies abroad may not have any sort of alternative.

*Prevention.* Try to have this covered in writing before you arrive, particularly for international travel. Also, know what other rental agencies are available at the airport or in the city where you plan to rent.

### **III. Liability and Insurance Coverage**

There are several types of insurance available to participants and leaders of AMC Adventure Travel trips that should cover or offset costs incurred as a result of an accident, incident, or unexpected event. Our goal is to prevent such events from taking place, but in the case that they do, the AMC Adventure Travel Committee and staff have put in place a variety of insurance coverage to ease the burden to both individuals and the AMC. It is the responsibility of the leaders to be aware of the coverage, and to educate participants on the risks they are taking and opportunities to purchase additional insurance.

#### **Insurance Coverage for Individuals (Participants & Leaders)**

➤ **Medical and Evacuation Insurance.** This coverage is provided for all trip participants and leaders and is included in the trip fee. It provides 24-hour On-Call assistance from the day the trip members depart from their home airports through the day they return home. *Please note:* it does not cover additional travel before or after an AMC Adventure Travel trip. United Healthcare Global will help with a variety of emergencies such as locating local physicians, hospitals, or dentists, arranging medical evacuations, healthcare assistance from staff nurses, and passing urgent information on to family members. Coverage includes \$5,000 for primary medical expenses and \$200,000 for emergency medical evacuation and \$5,000 for accidental death and

dismemberment. Information should be provided to each trip participant upon registration.

- **Leader Responsibilities:**

- **Provide Med/Evac information to each participant upon trip registration**
- **Understand the services provided by this coverage**
- **Carry the phone number for United Healthcare Global with you at all times during the AMC Adventure Travel trip. +1-855-286-8346 (USA) and +1-443-470-7143 (International). Tell them you are traveling with AMC and your policy is Arch Policy #11SPR0928400 A wallet sized card will be provided with this info.**

➤ **Optional travel Insurance from RoamRight**

- **What is it?** RoamRight Partners insurance services are optional insurance policies that are offered to our participants, so they can protect their investment including trip airline costs. The includes features like trip cancellation, trip interruption, accident/sickness medical expense, lost luggage, and missed flight connections.
- **Why offer it?** Although all our trips include medical evacuation insurance, this insurance does not cover any other travel expenses for individual participants. The RoamRight policy provide participants with an opportunity to purchase insurance that would reimburse their costs should they need to cancel, leave the trip early, lose their luggage, miss a connection, etc.
- **When does the insurance need to be purchased?** Currently, most insurance coverages can be purchased up to 24 hours before departure. Certain coverages (e.g. pre-existing conditions, cancellation for any reason) that are part of the more expensive insurance options must be purchased within 21 days from the date that the trip is confirmed.
- **When is the trip's official confirmation date for purposes of purchasing insurance coverage?** The official trip confirmation date is the date that an email goes to all participants confirming that the trip is a "go". This email typically provides information about final payment, flight parameters and the optional insurance information.
- **How to offer it?** It is best to offer the insurance when the trip is declared "a go", i.e. when the trip leader confirms to the participants that the trip will run as planned. An email should be sent to the participants letting them know about the optional insurance as well as a brochure or one-page flyer about the insurance.
- It is important to note that we are NOT insurance agents. All definitive information must come from published brochures or participant contact directly with RoamRight. Furthermore, while we offer RoamRight, a participant is free to use (or not use) any insurance carrier.
- **Options on how and when participant's purchase insurance:** Participants do not purchase insurance prior to confirmation that the trip will run as scheduled. Once the trip is confirmed participants can purchase insurance for the entire estimated cost of the trip including airfare and land arrangements, or only for the amount of the initial deposit check that they sent to the trip leader. If they purchase insurance for the entire trip, then they

are done. If they purchase insurance for only the amount of the initial check, they can continue to incrementally purchase insurance to cover additional trip expenses up until 24 hours before trip departure. As stated above, certain coverages are only available within 21 days of the trip's confirmation. Should a trip cancel, and the trip deposit be refunded, the insurance company will refund to the traveler the cost of the insurance as long the insurance company is notified in writing prior to the original departure date.

- Contact RoamRight Toll-Free 1-866-891-6614, if you have any further questions.
- **Leader Responsibilities:**
  - **Provide each participant with the website for this travel insurance *immediately upon sending the trip acceptance letter***
  - **Understand the coverage provided by this insurance**

Note: Trip participants pay for an AMC trip and the associated air travel with personal funds and hence it is their choice as to whether or not they purchase the optional travel insurance. Leader's expenses for an AMC trip and any air travel that is a part of the trip are paid for by the trip. If a leader is unable to go on a trip, the AT program will seek to replace the leader and the program will be responsible for any associated expenses. Hence Leaders should not purchase trip insurance to cover their expenses or air travel for an AMC-AT trip.

➤ **Personal Health Insurance.** It is recommended, but not required, for participants to have personal health insurance. Leaders should encourage participants to have a clear understanding of what is covered by their plans before departing. Leaders should also gather general information on participants' health insurance coverage. Such knowledge could be very useful in case of a medical incident. For instance, many health insurance companies will not pay directly for medical services abroad, even if it is covered on the plan. They may require the participant to pay for the services and *then* get reimbursed. Some plans will not pay for any medical care outside the United States.

- **Leader Responsibilities:**
  - **Carry participants' medical history forms with you on the trip. These forms include personal health insurance information.**

➤ **Insurance Available from Credit Cards.** A number of credit cards offer trip related coverage if the trip airfare is charged to the card. To take advantage of this option while still keeping control of the scheduling of flights, you can ask participants to either call the travel agent directly to pay for the pre-arranged flights, or ask participants to give you their credit card numbers for this purpose. Also, be aware that the use of credit cards may protect you for loss due to non-performance of the purveyor. If you plan to rent vehicles see Chapter 3 for information on insurance. Credit card information must be carefully guarded, and any written documentation of it should be shredded or otherwise destroyed as soon as the ticket purchase is made.

### **Insurance Coverage for the AMC Adventure Travel Program, Leaders, and the AMC**

The AMC (not chapters or committees) maintains insurance policies intended to cover the Club, volunteers, and staff from financial loss due to liability claims on club-

approved trips and events. It also protects Club leaders from personal financial loss due to liability claims (when they are acting for the Club). These policies are not intended to cover the medical expenses for participants on an AMC outing. Individuals are expected to be covered by their own medical insurance or have other means of providing for any personal medical expenses.

The activities covered by these policies are those that have been approved by an AMC committee or Chapter and are led by approved leaders. AMC leaders must be at least 18 years of age, club members, and have met all the requirements set by the activity's corresponding committee. The trip must be announced, advertised, or listed as a scheduled event in regular Club publications. The Chapters' Outings Committees, Hiking Committees, other activity specific committees (Camps and the AMC Adventure Travel Committee) are examples of trip sponsoring/approving Club units. *AMC Outdoors*, the chapters' activity schedules, newsletters, chapter or Club operated Internet web sites, voice mail systems, and camp postings are examples of publications. The Club liability insurance does not protect you as a leader of a pick-up or private trip. If you plan to offer a pre-trip hike or other activity prior to your trip, be sure to list this on your trip application form (even if the date is not known), so that the activity is considered an official AMC activity and is covered by insurance. If such activities are added after the proposal is submitted, notify the AMC-AT chair and the AMC Adventure Travel Programs Manager of the date and nature of the pre-trip activity (prior to the event).

During an AMC Adventure Travel trip, it is important that trip leaders do not make any recommendations for "free time." For example, if you have a free day in Sydney, Australia, let participants discover and choose their own activities rather than suggesting bungee jumping, flight-seeing, rock climbing, etc. Verbalizing or recommending options that are not covered by AMC's insurance policy, or are offered by operators who are not covered, could put the AMC at risk if an accident were to occur on a leader-recommended activity (even if it is not a group activity).

➤ **General Liability & Umbrella Insurance.** This policy is intended to cover claims alleging negligence by the AMC or its representatives (volunteer leaders and staff) that result in bodily injury or property damage to third parties. Volunteers and staff are covered while working in the capacity of their AMC assignment and acting within the scope of their duties. This policy only applies to claims filed in U.S. courts.

➤ **Foreign Liability Insurance.** This insurance policy will defend claims similar to those described in the general liability policy above, but in foreign courts. Some countries that are considered higher risk (those under trade or economic sanctions) are excluded from this policy, such as Iraq and the Congo.

➤ **Travel Agents' Professional Liability.** This policy covers AMC volunteer leaders and staff who are acting in the capacity of a travel agent or tour operator. This may apply to the preparation phase of any AMC Adventure Travel trip and would apply to those trips on which the leaders do *not* work with a tour operator, but act as the tour operator themselves.

➤ **Automobile Insurance.**

**General:** AMC also has extensive liability insurance for participants and leaders for both domestic and foreign travel. Medical and evacuation insurance is also purchased for every leader and participant. Consequently, the purchasing of any liability or medical insurance is redundant and we advise leaders not to spend trip funds on such insurance.

**CDW and LDW:** There are two categories of insurance that are relevant when vehicles are rented for use during an AT trip:

A: Collision or losses due to damage to the rented vehicle. The purchase of Collision Damage insurance is sometimes referred to as CDW; that is you are purchasing a collision damage waiver (CDW). The amount that is at risk is the full value of the vehicle plus its loss of use for many days. Depending on the vehicle the potential risk is an amount of \$20,000-50,000 or more. Purchased CDW insurance may have deductibles and limits on coverage. The actual coverage varies with the renting agency. Note that the particular location may be a franchise location and hence its coverage may not be the same as other locations of the same brand.

B: Loss of use: If a vehicle is damaged it may take days to repair and the rental company may charge for the loss of use during this period. This leads to the potential purchasing of a loss damage waiver (LDW). With some companies LDW includes CDW or vice versa.

**Auto insurance inside the United States, Puerto Rico, Canada and the U.S. Virgin Islands:**

If you are renting a vehicle for a domestic trip, the strongly preferred approach is to use the AMC corporate account with National/Enterprise. The vehicles will be rented under the AMC umbrella. You must decline LDW/CDW coverage since the AMC provides comparable protection: under AMC's policy, leaders and drivers will be protected in a manner similar as if they had purchased a car rental company's LDW/CDW coverage. There are deductibles and limits to AMC's coverage - collision coverage (minus a \$1000 deductible), comprehensive coverage (minus a \$500 deductible) and up to \$1000 in coverage for loss of use. Any deductibles or costs not covered by insurance will be paid for by the trip budget up to the limit which provides zero-dollar refunds to the participants. If the costs exceed this amount, the corporate AT budget will pay for those additional costs.

In addition to being able to decline LDW/CDW coverage, the benefits of utilizing the corporate rental agreement include:

1. You will only be required to provide a license (not a credit card) at rental pickup.
2. A bill will be generated and sent to AMC programs manager. She will coordinate so you submit payment when the financials are finalized at the conclusion of the trip
3. Additional drivers/backup drivers can be added to drive without charge
4. Participants will not be asked to provide their credit cards in order to rent or operate vehicles

If due to specific vehicle availability or extraordinary promotional pricing the leader decides not to use the AMC corporate account, then the leader **MUST** purchase LDW and CDW coverage for each vehicle. Leaders renting a vehicle in this manner should explain their reasons for doing so in the trip proposal.

Notes:

1. The leader's TD Bank debit card **DOES NOT** provide for LDW, CDW, or coverage for additional drivers.
2. Most personal credit cards provide secondary LDW/CDW insurance whereby the card holder's personal auto insurance is first used to pay for any damages. Using a typical personal credit card could affect your personal auto insurance rates in the event of an accident.
3. Excluding when vehicles are rented through the AMC corporate agreement, typically the rental car agency requires the principal driver's credit card to be used for each vehicle rented.

To rent vehicles using the corporate agreement, contact the Adventure Travel Programs Manager. He/she will provide with:

1. The corporate account# and the corporate billing number
2. A letter that describes AMC's corporate agreement with Enterprise/National.
3. Assistance as needed in the rental car process. Normally the leader, armed with the above information would contact the rental agency directly to rent the desired cars.

**Auto insurance outside the United States, Puerto Rico, Canada and the U.S. Virgin Islands:** If you are renting a vehicle internationally, you **MUST** take LDW/CDW coverage.

**When an accident occurs:** In the event of an accident with a rented vehicle the Leaders should contact the Emergency Roadside Assistance number of the rental company. The rental company will assess with you if the car is drivable, or if and when you will need a replacement vehicle. Once this has been determined, and after notifying AMC staff, you should contact the rental companies' customer service department, which varies by company and is typically open from 7am to 7pm EST.

Generally, there is a rental company incident/accident report in the glove box of the car; this should be filled out, copied and submitted to the rental company. A copy should be submitted to the Adventure Travel Programs Manager. You should also fill out the AMC Volunteer Accident/Incident Report Form (Appendix N of this Handbook and the same form that is used for medical incidents) and submit it to the Adventure Travel Programs Manager. Please take pictures of the damage to the vehicle for insurance purposes and also submit them to the Adventure Travel Programs Manager. If there are injuries, please refer to the emergency response plans outlined above.

Sometime (this can be months) after the accident the rental company will send to the leaders' invoices for the repair of the damage and the loss of use. These should be

forwarded to the Adventure Travel Programs Manager who will process them with AMC's insurance carrier.

**Other information:** 1) Be certain to list any expected drivers, in addition to the leader, as the contract requires disclosure of all licensed drivers on the rental.

➤ **Misconduct Insurance.** This policy provides coverage for claims related to sexual misconduct on an AMC Adventure Travel trip for volunteer leaders and staff.

### **Legal Protection**

➤ **Acknowledgement and Assumption of Risks and Release Indemnity Agreement:** Each participant on an AMC Adventure Travel trip *must* sign this form, often casually referred to as the "participant release form." By signing this form, a participant acknowledges that he/she understands the risks associated with the activities on the trip to which the form pertains, and that they will not hold the leaders or the AMC liable for any injury, damage, or death that occurs as a result of participating in the AMC Adventure Travel trip.

➤ **Federal Volunteer Protection Act:** The Volunteer Protection Act of 1997 went into effect on September 18, 1997. This law shields volunteers working for non-profit organizations from unreasonable and costly lawsuits and allows states to impose conditions for granting liability protection to volunteers. It does not protect persons guilty of willful or criminal misconduct, gross negligence, or reckless misconduct. According to the bill's author, Sen. Paul Coverdell of Georgia, "We know that more and more citizens are refusing to volunteer because they fear the financial consequences of absurd lawsuits, and [this act] will free volunteers—the heart of America's charities—from the burdens of unreasonable litigation... The Volunteer Protection Act will encourage the spirit of civic involvement and volunteerism that is so crucial to a healthy society and stronger communities."

## **IV. Motor Vehicle Driving Policy and Record Checking**

As an organization and as individuals, we hold a high degree of responsibility to our participants and for their safety. There is an expectation that we vet our drivers to ensure the safest possible experience for our participants. From a club perspective, our insurance agents have required we implement a driver program that clearly outlines who can drive and the qualifications needed. To reduce AMC risk: 1) each driver must have a safe record and 2) AMC leaders, when able, should drive, only utilizing participant drivers as needed.

For the purposes of this Section, the term **Vehicle** refers to any motorized vehicle designed to hold more than one passenger. This policy is applicable to any leader, co-leader or participant who may drive other trippers on an AMC Adventure Travel trip.

**Use of participant drivers** - Pre-trip materials should clearly inform participants of the potential that fellow participants may be driving if the trip requires additional drivers beyond the leaders. If an approved driver's performance presents a safety concern, participants are encouraged to communicate that concern with a group leader.

This policy and the associated Motor Vehicle Record Checking Authorization Form are in [Appendix S-1](#) of this Handbook. Procedures for implementing this policy are described in Chapter 2, *Planning a Trip*, and in Chapter 4, *Communications*.

#### **A. General Driver Qualifications – All Vehicles:**

- All drivers driving on behalf of an AMC Adventure Travel trip must read and sign this Motor Vehicle Driving Policy for AMC Adventure Travel Trip Drivers.
- All drivers must have a current valid operator's license.
- Minimum driver age is 18
- Drivers must be unimpaired when driving. This condition can be identified by the driver himself, a participant, trip leader or AMC staff. Impairments can include, but are not limited to: illness, injury, alcohol consumption, reaction to medication, or other distracted mental state.
- Drivers must have an acceptable driving history record as verified by the AMC and/or its insurance carrier. As determined by the AMC Director of Leadership & Volunteer Relations, an acceptable driving record is one free of multiple moving violations, citations for operating under the influence, reckless driving and similar serious offenses.
- Except in urgent situations, individuals who do not meet the above General Driver Qualifications (program participants, volunteers without AMC license approval, students, etc.) are **not permitted to drive** vehicles on behalf of the AMC.

#### **B. Responsibilities:**

- Drivers are responsible for reporting any apparent problems with their vehicles to appropriate authorities (i.e., rental agency) and for the conduct of their passengers while driving.
- Leaders/drivers will notify the Adventure Travel Program Coordinator as soon as practicable in cases of **damage to the vehicle, accidents, and/or interactions with law enforcement where a violation was issued.**

#### **C. Guidelines and Requirements:**

- Trip Leaders shall provide to each driver a copy of the AMC-AT Driver Check List (Handbook Appendix S-2) at the beginning of the trip. Drivers should read/review the Check List each day before driving.
- **Do not overload** vehicles with passengers or cargo. The heaviest cargo should be stored **in front of the rear axle** whenever possible.
- All drivers and passengers must **wear seat belts** as provided.
- No open **alcoholic beverages** or any **illegal drugs** are allowed in vehicles driven on behalf of the AMC.
- **No smoking** shall occur in any vehicle being driven on behalf of the AMC.
- Drivers must not **eat or engage in any other activity that could be distracting** while driving.
- **Do not** use a **cell phone for calls or texting** while driving. If you need to take a call, pull over safely and stop. Consider giving cell phones, maps, and so on to the passengers.
- With the exception of service dogs, **animals** are not allowed in vehicles driven on behalf of the AMC.



- **Avoid unpaved roads** whenever possible.
- In **winter**, warm vehicles up, and **clear all windows** of ice, snow, and dirt before operating. Over 95% of driving decisions are made visually. Ensure you have a clear field of view.
- In **winter**, remove ice and snow from the **roof** of the vehicle, if practicable. (Required by law in some states.)
- Drivers must be conscious of **road surface and traffic conditions** at all times and drive appropriately.

#### **D. Accidents and Violations:**

In the event of an accident or any traffic violation, the driver must inform the AMC-AT Leader or Co-leader who will, as soon as practicable, inform the Adventure Travel Program Coordinator. Fines as the result of traffic violations are the responsibility of the individual driver. **AMC will not pay for any violation issued.**

#### **E. Communications to Trip Participants if Fellow Participants are Needed as Drivers:**

In the event participants are needed to serve as drivers on a trip, the leaders shall inform the participants of that and remind them that concerns on approved drivers performance should be brought to the leaders' attention in the trip materials.

## Chapter 8

# Hiking, Backcountry and Camping Trips

---

There are considerations that you will have to take into account when you are planning and running a trip involving hiking, backpacking, backcountry skiing, snowshoeing, or camping. This chapter provides you with information that you need to consider during the planning stages, at the trailhead, on the trail, and in camp. A major focus is the principles of Leave No Trace, which need to be followed whenever you are in the backcountry.

### **Prior to the Trip**

Well in advance of the trip, contact the rangers or park officials who have jurisdiction over the area in which the trip is to occur. Obtain regulations and other helpful information. Do they limit the size of the groups using the area? Do they require the use of a Park approved outfitter or guide service? Is group camping permitted and appropriate in the locations you have selected? Do animals present a problem in the area? Do the park officials recommend any changes to your planned itinerary? If you have an injury or illness on the trip, and require assistance, what procedures should be followed?

Secure necessary permits for hiking, camping, fires, etc. On your trip proposal form, you are asked to state any permit requirements, so please do research early.

Plan how you will transport and use stoves. It is against the law to transport stove fuel on any airline. The United States Transportation Security Administration does allow stoves and fuel bottles to be carried in checked luggage, but they must be completely dry of fuel. You should contact your airline to make sure this is consistent with their current rules. It may be prudent to ship your stoves ahead of time to your destination or plan to rent this important item. You will have to budget for mailing stoves back and forth or renting them. Keep in mind that camp fuel residue inside a fuel canister is considered hazardous material and cannot be shipped, so make sure to empty your canisters completely and wash them with soap and water to get rid of any odor. Make sure that the type of fuel you will need is available in your destination city.

Obtain necessary maps for leaders and participants. These maps may give participants a better sense of where they are or where they are going and can be nice souvenirs of the trip. Obtain necessary equipment (including spare parts for maintaining essential equipment).

When you prepare your prospectus, make sure to include a detailed description of the trip including degree of difficulty, elevation changes, anticipated mileage per day, anticipated climate, and any other pertinent information. When you send the trip prospectus, include a list of required and recommended equipment. Be specific: i.e., lug-soled boots, broken in but in good condition, treated with snow seal, (specify the pack weight limit, if applicable). Request that trip members bring the equipment that they plan to use, to the pre-trip meeting. This will help reveal any potential problems well before the trip departs. Notify participants if there is any limit on the amount of personal equipment that they may bring. Tell each person how much group gear each will carry. Remind participants that in an emergency,

people may be asked to carry additional weight. Note that you, as the leader, have the right to weigh a person's pack.

If possible, send a roster of trip members to each participant. This will help people to become acquainted and may be helpful in arranging transportation.

To become acquainted with trip members, their equipment, and any problems they might have, arrange a pre-trip hike or backpack. As stated previously, this is the most effective way to determine each person's abilities and group compatibility. At this point, you may need to make the difficult decision not to accept any individual who does not fit the profile of the trip.

### **At the Trailhead**

If they have not already met at the pre-trip event, introduce the trip members and the trip leaders. Do the participants appear to be in good health? Do they have the necessary equipment?

Trail conduct should be explained regarding pace, rest stops, conservation issues, the role of the trail leader, the sweep, and provisions for first aid. The route and destination should be discussed, as well as any planned stops enroute. Assignments to the cook crew and other group chores, i.e. setting up the latrine, etc., may be done now or on arrival in camp.

Divide the community equipment and supplies to be carried by the trip members. This should be done carefully to ensure that all members receive a fair share. Physical condition or age may dictate that some loads be lighter or heavier than others. Give everyone instructions on what to do with the community equipment when they reach camp.

### **On the Trail**

Set an even, reasonable pace that can be maintained for a long period of time. Consider the needs of the slower members of the group – are they getting too far behind? Is the rest of the group getting ready to leave just as they reach a lunch or rest stop? There will always be a variety of hiking abilities in a group; some compromise may be necessary. On the other hand, a certain amount of discipline is necessary to keep the group moving. Moreover, in bear country it is very important that people stay together. Allow time to enjoy the scenery, take pictures, adjust clothing, etc. Consider taking radios with you to maintain contact between the leader and the sweep.

If the route is difficult to follow, you or someone familiar with the route should be in the lead. You should designate a trail leader and a sweep for each hike. The trip may be broken into two groups, if you and your co-leader are comfortable with this proposition. The sweep is responsible for keeping the group together. If the group starts to get too spread out, or if someone toward the end of the group is having difficulty, the sweep should notify you or your co-leader (if one of you is not the sweep). Hikers with problems or who are less strong usually work their way toward the end of the line. The sweep should not let any trip member get behind him on the trail, should carry a [first aid kit](#) and a whistle, and should not be weak or inexperienced.

Keep an eye out for factors that may change over the course of the day. Observe the condition of the group members, and deal with any problems that seem to be developing, i.e., blisters, fatigue, etc. Observe the weather and the group's progress: make any necessary adjustments in the plans.

You must control alternate activities. It is at the leader's discretion that any unplanned activity occurs. (This should be stated in your correspondence, at the pre-trip meeting or at the trailhead). Before you allow any alternate activities, you, as the leader, should ascertain that conditions are favorable, the individuals who are proposing to participate in this activity are capable, prepared for unforeseen circumstances (e.g. do they have a [first aid kit](#), etc.), and will not compromise the group. Individuals should not be allowed to hike alone, and groups should comprise at least 3 or 4 members. You should appoint a hike leader for any alternate activity. This should be the most responsible person, (in your estimation). A leader approved alternate activity is considered part of the trip when expressly stipulated by the leader. Ideally, one of the leaders will participate in the alternate activity.

### **In Camp**

The campsite will probably have been selected in advance from a scouting trip or from studying maps and other information. You should consider several factors when selecting a campsite. A safe site is a necessity; it should be free from danger of avalanche, flash flood, or overhanging trees that might blow down in a high wind. A good supply of water is important. While most trips rely on stoves for cooking, there are times when a supply of firewood is important. All campsites should be selected according to park regulations as well as to the *Leave No Trace* guidelines provided in this chapter.

As hikers arrive in camp, all community equipment must be deposited in a designated central location. A kitchen area should be designated and set up.

Some trips have group cooking with cook crews appointed by the leaders. Crews might be responsible for three meals: dinner, breakfast, and lunch. They are free from these chores until it is their turn again. The number of times that a crew has to serve depends on the length of the trip and the number of participants. The crew may find it handy to declare the kitchen "off limits" to the rest of the group, or they may welcome volunteers. Some leaders prefer small group or individual cooking.

Assignment of chores while in camp is usually necessary unless you as the leader and a few select individuals want to do all of them. Work duties should be given out to all members of the group so that there is an even distribution to all. Cook crews should not be given chores on their cook days, as they will most likely have enough to keep them busy. Good cooks should not be given the responsibility of all the cooking. Consider splitting all chores equally and publishing them on a list. Let people exchange chores if they wish. This way their value is applied to the task. Note that it is usually wise to place tent mates on different chores. Water for drinking is an important consideration. Let your trip members know that it is the responsibility of everyone to obtain and (where necessary) *filter* water.

Camp clean-up should be a continuous process. Prior to the trip, an effort should be made when packing to keep the amount of waste to a minimum. *Leave No Trace* practices on the disposal of trash and human waste are listed and described below.

If you are staying in a location that is prone to bear activity, make sure you review how to bear-proof your camp with all of the participants. In areas that have a high risk of bear activity, hang or store all food and toiletries in bear-proof containers (if available) as soon as you arrive in camp, even before setting up your tents. A kitchen should be established at least a few hundred feet away from the sleeping area, and any food storage should also be a good distance away from the sleeping area.

### **Sign In/Sign Out Policy (participant separation protocol)**

For free days on a trip, no formal sign out is necessary as long as leader communicates when and where everyone is to meet, and has a way for participants and leaders to communicate in case of an emergency when the group is separated. If someone plans a significant and/or prolonged trip separation, or if there is an early departure or potential risk associated with independent travel, the leader and participant should complete [Appendix W](#) (participant separation protocol form) and exchange the necessary information.

### **Leave No Trace**

Leave No Trace is a national and international program designed to assist outdoor enthusiasts with their decisions about how to reduce their impacts when they hike, camp, picnic, snowshoe, run, bike, hunt, paddle, ride horses, fish, ski or climb. The program strives to educate all those who enjoy the outdoors about the nature of their recreational impacts as well as techniques to prevent and minimize such impacts. Leave No Trace is best understood as an educational and ethical program, not as a set of rules and regulations.

Leave No Trace information is rooted in scientific studies and common sense. The information is framed under the following seven Leave No Trace Principles each of which is discussed below.

1. Plan ahead and prepare
2. Travel and camp on durable surfaces
3. Dispose of waste properly
4. Leave what you find
5. Minimize campfire impacts
6. Respect wildlife
7. Be considerate of other visitors

#### **Plan ahead and prepare**

- Know the regulations and special concerns for the area you'll visit.
- Prepare for extreme weather, hazards, and emergencies.
- Schedule your trip to avoid times of high use.
- Visit in small groups when possible. Consider splitting larger groups into smaller groups.
- Repackage food to minimize waste.
- Use a map and compass to eliminate the use of marking paint, rock cairns or flagging.

#### **Travel and camp on durable surfaces**

- Durable surfaces include established trails and campsites, rock, gravel, dry grasses or snow.
- Protect riparian areas by camping at least 200 feet from lakes and streams.
- Good campsites are found, not made. Altering a site is not necessary.

In popular areas:

- Concentrate use on existing trails and campsites
- Walk single file in the middle of the trail, even when wet or muddy
- Keep campsites small. Focus activity in areas where vegetation is absent.

In pristine areas:

- Disperse use to prevent the creation of campsites and trails.
- Avoid places where impacts are just beginning.

### **Dispose of Waste Properly**

- Pack it in. Pack it out. Inspect your campsite and rest areas for trash or spilled foods. Pack out all trash, leftover food, and litter.
- Deposit solid human waste in cat holes dug 6 to 8 inches deep at least 200 feet from water, camp, and trails. Cover and disguise the cat hole when finished.
- Pack out toilet paper and hygiene products.
- To washing yourself or your dishes, carry water 200 feet away from streams or lakes and use small amounts of biodegradable soap. Scatter strained dishwater.

### **Leave What You Find**

- Preserve the past: examine, but do not touch, cultural or historic structures and artifacts.
- Leave rocks, plants and other natural objects as you find them.
- Avoid introducing or transporting non-native species.
- Do not build structures or furniture or dig trenches.

### **Minimize Campfire Impacts**

- Campfires can cause lasting impacts to the backcountry. Use a lightweight stove for cooking and enjoy a candle lantern for light.
- Where fires are permitted, use established fire rings, fire pans, or mound fires.
- Keep fires small. Only use sticks from the ground that can be broken by hand.
- Burn all wood and coals to ash, put out campfires completely, then scatter cool ashes.

### **Respect Wildlife**

- Observe wildlife from a distance. Do not follow or approach them.
- Never feed animals. Feeding wildlife damages their health, alters natural behaviors, and exposes them to predators and other dangers.
- Protect wildlife and your food by storing rations and trash securely.
- Control pets at all times or leave them at home.
- Avoid wildlife during sensitive times: mating, nesting, raising young, or winter.

### **Be Considerate of Other Visitors**

- Respect other visitors and protect the quality of their experience.
- Be courteous. Yield to other users on the trail.
- Step to the downhill side of the trail when encountering pack stock.
- Take breaks and camp away from trails and other visitors.
- Let nature's sounds prevail. Avoid loud voices and noises.



## Chapter 9

# Evaluating AMC Adventure Travel Trips

---

We continually evaluate the quality of our AMC Adventure Travel (AMC-AT) trips. We do this by distributing online surveys to all trip participants. The information from the surveys is used to evaluate trip leaders and provides valuable feedback concerning the success of their trip. An AMC staff member oversees the surveys and a summary report that is emailed to the Leader, the Co-leader and the AMC-AT Chair once enough responses have been received.

The AMC-AT Chair brings to the attention of the AMC-AT Committee (AMC-ATC) any trip:

1. That has sufficient survey responses of a negative nature indicating a serious problem. Serious problems may include leader competency, clearly improper handling of finances and/or participants, and failure to follow the program described in the prospectus (without a valid reason).
2. That has inadequate, questionable or overdue financial reports.
3. That has more participants than the number approved by the AMC-ATC.
4. For which the President, another AMC official, or staff member has received a letter of complaint.

### ➤ **Investigation of Reported Problems**

When a phone call from the AMC-AT Chair or the Adventure Travel Programs Manager fails to resolve a problem satisfactorily, there is a review procedure.

1. The AMC-AT Chair or the Adventure Travel Programs Manager will inform the members of the AMC-AT Executive Committee. One or two other AMC-ATC members may also be involved.
2. The AMC-AT Executive Committee has a monthly conference call, but calls can be arranged by any member on an as needed basis.
3. If the AMC-AT Chair or the Adventure Travel Programs Manager have not already debriefed the leaders of a trip that has been identified as having had problems, another member of the Executive Committee may volunteer to do so.
4. The Executive Committee may then clear the Leader or Co-leader, assign the Leader to a mentor, recommend that the Leader attend additional training, or limit the type of trips the Leader is allowed to lead.



5. This Executive Committee serves in place of the full AMC-ATC and has the authority to act between meetings and will make recommendations to the full membership of the AMC-ATC, including the possible disqualification of a leader. Such considerations will be reviewed in an executive session at the next meeting of the AMC-ATC.
6. Removing or downgrading the status of a Leader is a sensitive matter. There are several important considerations. First, problems should be investigated quickly and thoroughly. Second, the Leader should be given a chance to explain what caused the problem or to provide evidence that the complaint is not valid. Finally, any investigation should be continued until the investigators reach a consensus.
7. The Leaders of a trip may appeal a decision of the Executive Committee to the entire AMC-ATC. This session will be conducted in an executive session.
8. If a Leader is removed from the AMC-AT leadership roster, the AMC-AT Chair confidentially shares this information with other Club and Chapter Committee Chairs. This is to reduce the Club's risk in other leadership areas.

### ➤ **Interpreting Trip Evaluation Surveys**

Post trip surveys are a tool that you, as a leader, and the AMC-ATC can use to make trip offerings better for the future. While the surveys are a tool for the Committee to uncover problems, their primary purpose is to enable leaders to lead better trips. Leaders should examine the survey results carefully to determine what it is you may need to improve, and in what ways you were successful.

Look at the overall tone of the summary to get a feel for general participant attitudes. The following are a few things to look at:

- If there is only one negative or ambivalent comment, it may mean that there was someone on your trip that simply did not mesh with your style of leadership or with the group. (We all have styles of leading and yours may not sit well with 100% of the public – this is a fact of life). If you know who your problem person was, ask yourself how you could have improved their enjoyment. You can learn from this one unsatisfied person
- If there are two or more negative or ambivalent responses from unrelated people, you and the AMC-ATC should probably be concerned. The AMC-AT Executive Committee may decide to speak directly to the Leaders about it. The goal is not to condemn Leaders but to improve all AMC Adventure Travel trips.
- Remember that the survey asks for feedback on many aspects of the trip. While some comments may relate directly to your leadership, others may provide feedback on logistics that could be improved if you or another person decides to run the trip again in the future.