



# Adventure Travel Leader Guide

*This Guide will serve to direct practicing and aspiring Leaders through the process of proposing, planning, leading, and completing an Adventure Travel Trip.*

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# Introduction

The Mission of Colorado Mountain Club Adventure Travel ("AT") is to provide a variety of high quality domestic and international outdoor adventure trips for active travelers who are current and prospective Club members. AT Trips include eco-sensitive, cultural, and educational components on multi-day domestic or international trips.

The AT program also helps to support the overall goals and strategies of the Colorado Mountain Club. In order to fulfill this mission, the Club has organized the AT Committee. The responsibilities include:

- Developing and managing a sustainable AT program for the Club, with appropriate trip offerings, growth, and pricing;
- Developing and supporting competent AT Trip Leaders who have the skills to manage unpredictable and/or stressful situations with grace, humor, risk management, and authority.

## ***Purpose of the AT Leader's Guide***

The Guide's emphasis is distinctly limited to the mechanics and formalities of leading a trip that are required by Club policies and the AT Committee. Copies of the required forms and documents are referenced in this Guide and can be found on [www.cmc.org](http://www.cmc.org). The entire process of leading a trip is a topic which could not be contained in a single volume, and much of which cannot be written at all. It is certainly not intended that this Guide serve to educate anyone in



these intricacies. This Guide is not intended to be a static document; it will be updated as the rules and requirements of AT Trip Leadership change.

## ***What is an AT Trip?***

Under CMC guidelines, an AT Trip is defined as *any trip in which participants pay for some, or all, of the Leader's trip costs.*

AT Trips offer Club members unique opportunities to try out new skills and experience foreign cultures. Because our trips focus on active participation, there is a sense of satisfaction and camaraderie that comes from a successful trip. AT Trip Leaders are volunteers, and are never “paid.” However, the Club expects that a Leader’s trip expenses will be reimbursed, because these expenses were incurred while the Leader was acting as a representative of the Club during an AT Trip. A “shared expense trip” does not fall within the category of “Adventure Trips” and may simply be advertised in the regular Club schedule.

## ***Definitions, Abbreviations and Acronyms***

|                        |  |
|------------------------|--|
| CMC, The Club          | Colorado Mountain Club   |
| AT                     | Adventure Travel   |
| ATC                    | Adventure Travel Committee   |
| ATC Liaison            | A member of the ATC that is assigned to act as a mentor to support a trip Leader   |
| AT Trip                | Any trip in which some or all of the Leader’s expenses are borne by participants   |
| Leader; Primary Leader | A seasoned, fully-qualified person who has the primary responsibility for planning and executing an AT Trip; Leaders receive full reimbursement for the cost of their trip |



|                   |  |
|-------------------|--|
| Co-Leader         | A seasoned, fully-qualified second Leader who shares the responsibility for planning and executing a trip;<br>Co-Leaders receive full reimbursement for the cost of their trip   |
| Assistant Leader  | A seasoned, fully-qualified second Leader who assists the Leader in some or all aspects of a trip;<br>Assistant Leaders receive a percentage discount on the cost of their trip  |
| Mentor Leader     | A seasoned, fully-qualified Leader who is providing coaching/mentoring to a new or inexperienced Leader  |
| Apprentice Leader | A new trip Leader, or someone having little prior experience organizing and/or leading AT Trips for groups   |
| Applicant         | A person(s) who has registered for the Trip either thru the website or contacting the Trip Leader  |
| Participant       | An applicant who has been approved by the Trip Leader  |
| Outfitter         | An individual or organization that assists with the planning and execution of a trip. An Outfitter is generally hired by the trip Leader and is paid a fee for the work they do, the equipment/supplies they provide, etc. |

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## Who Are AT Trip Leaders?

Trip Leaders should have the skills to manage unpredictable and/or stressful situations with grace, humor, risk management, and authority.

- [The Trip Leader Application Form live here >>>](#)
- [Trip Leader Applicants go into this Sheet >>>](#)



## ***What Does It Take to Lead? Trip Leader Requirements***

In order to lead an AT Trip, one must:

- Clearly **demonstrate the skills necessary** to be a Club AT Trip Leader. A person may demonstrate these skills through:
  - Holding a Wilderness First Aid certification or higher - If it has been more than 4 years since you completed WFA then you will need to complete the full 16-hour WFA school. Apply through the SALT program for free tuition. If it has been fewer than four years since you completed WFA you are eligible for the WFA Refresher School. This is an 8-hour course focused on scenario practice of common, recurring accident/incident field situations. More information about Wilderness First Aid schools can be found here:  
<http://www.hikingdenver.net/schools/wilderness-first-aid> Apply through the SALT program for free tuition. The SALT application is at: <https://goo.gl/DhBZfM>
  - Having successfully led adventure travel trips for other organizations
  - Completed the Club's AT Leader Workshop
  - Co-led a trip with an experienced Club AT Leader
  - Any combination of these activities:
    - Have **knowledge** of the proposed trip's area
    - Have the **expertise** required to lead the trip
    - Have the **energy** to undertake the planning and the responsibility of leading a group of Club members
- Follow the Club guidelines set forth in this Guide
- For major expeditions, Leaders may be required to have **additional experience** in leading a previous trip of the same type or to the same destination

## ***Responsibilities Of Trip Leaders***

AT Trip Leaders are responsible for:

- Acting as a Club ambassador
- Organizing the trip
- Developing the trip budget and proposal
- Engaging with potential trip participants
- Selecting participants
- Ensuring that accepted participants have made full and proper payment(s) according to the trip payment schedule
- Arranging pre-trip meetings and training sessions (as appropriate)



- Managing logistics during the trip
- Leading activities during the trip
- Working to ensure the safety and satisfaction of trip participants
- Completing post-trip activities

## ***Benefits for Leaders***

The Club recognizes the hard work and time required to lead a trip. Therefore, the Club reimburses the Leader for trip expenses. In order to further support AT Leaders, the Club provides advertising, other marketing efforts, and space for pre- and post-trip meetings at the Club offices. Through the AT Committee, the Club provides guidance and communication through training, periodic leader meetings, newsletters, guidebooks and standardized forms. Additionally, the Club may provide assistance with bookkeeping, mailings, and other clerical work.

## ***Types Of Trip Leaders***

Here are a few terms to help you understand the types of Leaders that CMC supports.

### ***Leader (a.k.a. Primary Leader)***

A trip Leader is a seasoned, fully-qualified and trained individual that takes the primary role in the Proposal, Pre-trip, Trip and Post-Trip phases. If the Leader requires an Assistant Leader, Co-Leader and/or Outfitter, the Leader orchestrates trip activities and assigns duties collaboratively with them. A Leader receives full reimbursement for direct trip related expenses; however, the price for individual participants must remain commercially reasonable.

### ***Co-leader (two leaders)***

Trips with Co-leaders can provide added safety and leadership resources for trip participants. A co-led trip is appropriate when:

- Two Leaders are needed to organize and guide activities (e.g., on a predominantly self-guided trip)
- The number of participants would be unmanageable for one Leader
- There is a need for a designated back-up Leader in case the primary Leader is not able to fulfill leadership duties

Proposals for co-led trips must justify the appropriateness of including two Leaders. The AT Committee will assume that both Leaders will perform in a manner resulting in an equal sharing



of duties and responsibilities. The Co-leaders will designate one of the Leaders to be the primary contact person for the AT Committee Liaison and trip participants. A Co-leader receives full reimbursement for direct trip related expenses; however, the price for individual participants must remain commercially reasonable.

### ***Assistant Leader***

Some trips have a level of responsibility and organization that is not manageable for one Leader, but would be appropriately structured with an **Assistant Leader**. An Assistant Leader may be needed when (*these are just some examples*):

- Due to a trip's location or in-country responsibilities, a Leader requires help with Co-guiding hikes and/or other trip activities
- Being a designated back-up Leader in case the primary Leader is not able to fulfill leadership duties
- Managing a large number of trip participants
- When a new Leader would benefit from initial exposure to plan, organize, and implement a trip before taking a leadership role as an Apprentice Leader with a Mentor Leader (*see below*)

### ***Apprentice and Mentor Leader***

New trip Leaders, particularly those having little prior experience organizing or leading adventure travel trips for groups, may benefit from organizing a trip as an Apprentice Leader with a CMC Mentor Leader. An Apprentice Leader and his/her Mentor Leader should select a trip with a location, activities, and appropriate level of responsibilities that:

- Is appropriate for the Apprentice Leader to demonstrate his/her trip leadership skills
- Can absorb the cost of full reimbursement for two Leaders

In order to keep the trip price at an appropriate level, both the Apprentice Leader and Mentor Leader will need to perform leadership duties during the Trip Phase (for example, trading off leading hikes on a self-guided trip or acting as Co-leaders for a group that would be larger than is appropriate for a single Leader).

The trip budget should be primarily prepared by the Apprentice Leader (with review and input from the Mentor Leader) and must include justification for including two Leaders. The price for individual participants must remain commercially reasonable.

The AT Committee expects:



- That the Apprentice Leader performs all of the tasks necessary to be an independent Leader in his/her next leadership role
- That the Mentor Leader guides and reviews the activities of the Apprentice Leader to ensure that trip participants have a travel experience that is of high quality and consistent with AT Committee policy
- That, after the trip, the Mentor Leader provides a summary of Apprentice Leader's preparedness for leading future trips for the Club

### ***Outfitter or Guide***

In some cases it may be prudent, or necessary, to engage the services of an Outfitter or a Guide. These services can range from logistical support to actually taking a leadership role in the trip. However, the AT Leader **must always have a prominent role in the decision-making and logistics** of the trip; more than that of an ordinary participant. The Leader may be asked to submit a plan that delineates areas of responsibility for Outfitter/Guide and Leader. In addition, the Outfitter or Guide may be required to show proof of insurance. All outfitters that are providing water sports (e.g., rafting, kayaking) shall provide insurance and agree to name the CMC as an additional insured.

### ***Use of an Assistant Leader, Co-Leader and/or Outfitter, Assistant Leader***

Generally, Assistant Leaders receive a percentage discount of the trip price, which will vary according to the extent of the Assistant Leader's responsibilities. However, the trip budget must justify the appropriateness for including an Assistant Leader, and the price for participants must remain commercially reasonable.

### ***What Trip Leaders Shall Not Do***

- Run a trip through any travel agency or Outfitter in which he or she (or his/her immediate family) has an ownership interest
- Run a trip for personal profit
- Accept tips or other payments from trip participants



# How To Lead A Trip

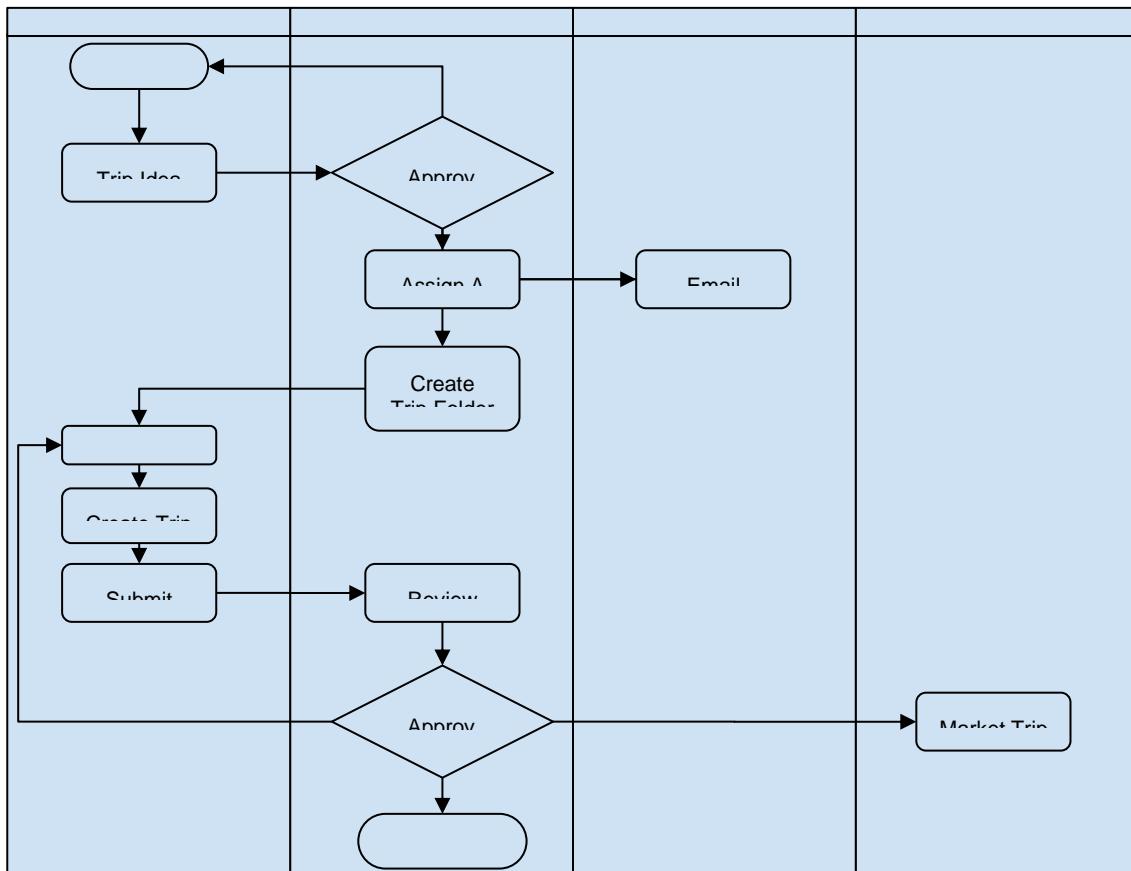
The following information is a guide for trip Leaders. If you have questions, please contact your AT Committee Liaison. There may be occasions when an exception may be appropriate. In such cases, the AT Committee or designated Committee Liaison will provide additional guidance.

The process of designing, preparing and leading an AT Trip can be summarized in these phases:

- [\*\*I. Trip Proposal Phase\*\*](#) - Leaders design the trip and complete a number of important documents that describe the parameters of the trip
- [\*\*II. The Pre-Trip Phase\*\*](#) - Leaders contact and select participants, prepare participants for the Trip, and complete any necessary pre-trip organizing
- [\*\*III. The Trip Phase\*\*](#) - Leaders embark on the trip with the Participants and manages all aspects of the Trip while it is in progress
- [\*\*IV. The Post-Trip Phase\*\*](#) - Leaders complete and submit summary reports and financial information about the trip



# I. Propose A Trip



## ***Step 1: Submit Your Trip Idea To The AT Committee***

New Trip Ideas should be submitted to the AT Committee using the Trip Proposal Request form on the [Trip Leader Resources page](#). Trip Ideas should be submitted as soon as possible, preferably at least one year in advance of the proposed trip.

- [The webpage where Trip Ideas are entered lives here >>](#)
- [Trip Ideas go into the AT Trip Hopper lives here >>](#)

Leaders should submit trip ideas with sufficient lead time to:

- Design, plan and organize the trip



- Advertise the trip (with CMC administrative assistance)
- Review participant information
- Complete pre-trip activities

A Trip Idea Includes:

- Destination - what countries, destinations, regions are you visiting.
- Activities - what participants will be doing
- Timing - month and year
- Length - how many days or weeks

Trip Ideas that are submitted will be reviewed by CMC's AT Marketing Coordinator to ensure that trips are consistent with the overall objectives of the Club and the AT program. They are also compared to other trips in the planning process to see if there is destination overlap, trip redundancy, or timing conflicts.

If your trip idea is deemed of interest, an AT Committee Liaison will be assigned to you to assist in the development of your trip proposal. A Trip Folder will also be created and shared with you. This folder contains the formal Trip Proposal and other planning tools.

The trip will also be added to the [AT Trip Hopper](#), which will reserve the trip in the AT Trip schedule in case other new trips to the same destination and time frame are submitted. Trips are generally added to the Trip Hopper on a first come, first served basis so Leaders should submit their new trip ideas as early as possible. **Note:** Information regarding past trips can be found in [Google Drive here >>](#)

### **New Leaders Need To Complete These Additional Steps**

The AT Committee expects all prospective AT Trip Leaders to demonstrate the skills necessary to organize and lead a Club AT Trip prior to leading trips for the Club. As part of the new Leader acceptance process, and before submission of the prospective Leader's first trip proposal submission, prospective Leaders must:

- To the liaison by email . use website as a guide
  - Submit a [Leader Profile](#), which describes his/her leadership experience in the field and used by the committee to determine a leader's fitness to lead AT Trips.
- Have taken the AT Leader Workshop offered periodically by the AT Committee
- Have taken Wilderness First Aid training with refreshers



- Submit a [Leader Bio](#), which will be listed on the CMC AT Trip Leader web page for trip participants to see highlights of the trip leader's background.

Status as a CMC Group-level trip Leader is a favorable credential; however, by itself is not sufficient to qualify a person to lead Club AT Trips.

## **Step 2: Design Your Trip**

Depending on the trip type and destination, these are some items that you may want to consider when developing your trip idea (*this is not an exhaustive list*):

- **What is your ideal group size?** Consider that small groups may be easier to manage and large groups will allow more members to enjoy the destination. The AT Committee may require a minimum number of participants for a trip to cover budgeted costs and remain competitively priced (see below: *Determining a “Critical Mass” for Trips*).
- **What is the ideal timing for your trip?** Consider expected weather and season, the need for rest days or additional days for luggage arrival in remote destinations, the need to coordinate arrival of flights with other transportation, and timing that could maximize the desired group size.
- **Consider the cancellation/refund policies for your trip.** In the event that the Club cancels a trip, a participant cancels his/her place on a trip, or the leader cancels the trip, the policies must be clearly defined and communicated to the trip participants and to the AT Committee and trip Liaison.
- **Consider including a co-leader or assistant leader.** In cases where a trip will be budgeted for a larger group (e.g., greater than 15 participants), is a self-guided hiking trip, or has considerable safety concerns a co-leader or assistant leader may be appropriate. Additionally, a co-leader or assistant leader scenario may allow a new leader to gain experience without needing to take on full leadership responsibilities for a trip.

### **Determining a “Critical Mass” for Trips**

When determining an appropriate number of participants for a trip, Leaders should consider:

- The type of trip
- Manageability of the group size
- Leader/participant or guide/participant ratios
- Difficulties of the activity and locale



Leaders should work with their AT Committee Liaison to ensure the trip Leader and Club resources are generating sufficiently high levels of exposure to market the trip. Trip Leaders should determine a timeframe at which a decision should be made regarding cancelation of the trip. This timing may coincide with Outfitter or lodging cancellation policies and the need to finalize travel plans.

**Generally, all trips should specify a minimum and maximum number of participants.**

Trips without the minimum number of participants will usually be cancelled. However, the AT Committee, with input from the trip Leader, will consider many factors when deciding whether to cancel a trip. For example, the trip may be to a destination or in an activity that is strategically important to the Club. In an undersubscribed trip, any amount of budgeted trip expenses that exceeds the costs plus the Club administrative fee must be approved, in advance, by both the Adventure Committee Chairperson and Club's Staff representative.

A trip Leader may request that a trip, which would otherwise be cancelled by the AT Committee, not be cancelled. For example, assume a trip is half-full and at risk of cancellation by the AT Committee. Assume the participants are well-known to the Leader, and the Leader is prepared to take the smaller group and forego full reimbursement for direct trip related expenses. If the price of the trip is not changed and the Club's ability to collect the Club Administrative fee is not compromised, the AT Committee may agree to not cancel the trip.

**HAMC Trips**

Trips approved by the High Altitude Mountaineering Committee (HAMC), under authority delegated from the AT Committee, often have fewer participants due to the technical nature of these trips. The trip Leader, working with the HAMC Expeditions Coordinator and/or HAMC Chair, will decide what constitutes a viable number for a high altitude expedition to be a "go." In these situations full reimbursement of the Leader's direct trip related expenses may not be feasible. If the Leader contributes cash to offset expenses, the Club will provide to the Leader (upon request by the Leader) a letter acknowledging the cash donation was made to the Club.

**Using Guides And Outfitters**

- Consider whether you will need a guide or outfitter for the trip. Alternatively, you may decide that you will be the guide and/or Outfitter as well as the trip Leader. You may decide to share responsibilities with a Co-leader (e.g., if you will be self-guiding the activities).
- If you plan to use a Guide or Outfitter, be sure to identify specifically **what types of services will be needed.**



- Request the Guide or Outfitter to be named as an Additional Insured on their insurance policy. If they don't have insurance you can not use them.
- If you will be **traveling to a country that requires you to have a Liaison Officer**, contact your AT Committee Liaison for additional information (or contact the Chair of the AT Committee, if you do not yet have a Committee Liaison). To determine if your country needs a Liaison Office contact your Trip Liaison.
- When contracting with an outfitter, **be confident that you are working with a viable person/business**. Some ways to gain comfort are to:
  - Use vendors/guides/outfitters “entities” that have been used on prior CMC AT Trips
  - Use entities that have been personally recommended by other AT leaders (i.e., could have been used for past AT Trips or a personal trip)
  - Ask the entity for references
  - Do some internet sleuthing (e.g., TripAdvisor or Google search)

### **Travel To and Within Destination Countries**

- **Determine the estimated costs** of in-country travel, lodging, meals, and other costs for your trip. While you will not be able to make firm reservations before a trip is approved by the AT Committee, potential service vendors should be able to provide estimated costs and details about cancellation policies. Base your trip budget on these estimated costs. You may want to consider that prices may increase slightly and that exchange rates can be volatile. You can allow for these factors by selecting a conservative exchange rate or enhancing the contingency amount.
- **Identify which legal documents and permission will be necessary for your trip.** For example, visas and climbing and registration permits are required for entering some countries and for travel within a country. U.S. National Parks generally require hiking and camping permits. Some countries may require a letter of invitation from an entity within the country in order to obtain a visa. You may need to obtain some of these documents several months prior to your departure. Discuss these matters with your AT Committee Liaison when determining whether costs to obtain these documents should be addressed in the trip budget or be borne individually by trip participants (or contact the Chair of the AT Committee, if you do not yet have a Committee Liaison).
- **Determine any medical requirements for your trip's destination country.** For example, are vaccinations or special medications needed for safe travel?



## ***Step 3: Complete the Trip Proposal Documentation***

The Trip Leader is required to complete all the necessary documentation to describe the trip in enough detail that the AT Committee, and eventually any interested participants, have a clear understanding of the parameters and pricing for the trip.

### ***Trip Documents and Their Purpose***

Template documents will be created in folder on Google Drive with the Trip's name and year. [Training on G Suite can be found online here >>](#). The primary Google Docs for each Trip and their purpose are below:

- Trip Folder - named for the Trip and Month-Year, contains all the Trip documents
- Trip Itinerary - a detailed description of the trip with descriptions of each day
- Welcome Letter - this is sent to participants once they are approved
- Trip Workbook - a spreadsheet with several tabs combining a lot of information about the Trip
- Payment Schedule and Stub - records how a Participant paid and when all payments are to be made
- Participant Information - a form that captures information about each Participant

### **Initial Trip Proposal**

Describe your qualifications to lead the trip, the educational value of the trip to participants, and information that will be shared with prospective participants via the Club's advertising and marketing channels. Information from the Proposal is used to market the trip via a number of channels. This is likely the first place the potential participant will see any information about the trip; the information should be clear and complete enough to generate interest for people.

### **Marketing Considerations For Proposals**

Do market research to ensure that CMC trips are at or below market rate

1. Use the internet to research similar companies, such as (but not limited to):
  - a. [REI Adventures](#)
  - b. [National Geographic Expeditions](#)
  - c. [Backroads Travel](#)
  - d. World Travel
  - e. Local outfitters and guides in your proposed trip location
2. If using an outfitter, double check that CMC price is not above the rate that the outfitter charges if the guest books directly through them
3. Final price, with 20% CMC markup, must be at market rate or below



### **Detailed Itinerary**

An Itinerary that is detailed enough so participants have a good idea of the day-to-day activities contained within the trip. The Itinerary may be included in the Proposal or as a separate document. If separate, request a link to the document from within your Proposal.

### **Welcome Letter**

A Letter to the participants with a detailed description of all the necessary information they need to know about the trip. The detailed itinerary may be included in this Welcome Letter.

### **Participant Application**

This is now a PDF document. The leader only needs to add the trip name and dates, leader information and additional questions related to the specific trip that the leader wants participants to answer. Participants can fill out their personal information in the provided fields and answer the questions added by the leader. This form does NOT need to be signed and can be emailed to the leader when applying for the trip.

### **Budget And Financials**

This is in the Trip Workbook in Tab "4 - Trip Budget". It's designed to help Leaders calculate the daily costs of the trip. In the trip planning phase, this spreadsheet is the single most important document a leader can use. This is a very well designed spreadsheet and can greatly assist leaders in accurately determining Trip costs.

### **Cancelation Form**

This lists the trip name and dates, cancelation dates and conditions. This must be signed by the applicants and can be signed electronically and emailed to the leader. It can also be printed by a participant, and then signed, scanned, and returned to the trip leader.

### **Participant Waiver**

The Waiver Form is a fixed PDF form which cannot be changed by the leader. This must be sent to and signed by the applicants and can be signed electronically and emailed to the leader. It can also be printed by a participant, and then signed, scanned, and returned to the trip leader.

## ***Determine Your Trip Costs and Prepare Your Budget***

Pay special attention to how you, as the Leader, add value to the trip when determining your budget for the trip. Here are some factors to consider when pricing your trip:

- Trip Leaders should budget trips so that all participant and leader costs will be covered. The Budget and Final Financials worksheet will help you identify and include all the cost



of the trip. This is a 2 tab Excel spreadsheet. The 1st tab is optional but carefully designed to help leaders calculate the daily costs of the trip. If the 1st tab is used, totals data from fields on the 1st tab are carried to the appropriate fields on the 2<sup>nd</sup> tab. Additional data can be entered on the 2<sup>nd</sup> tab as necessary. For simpler trips, the 2<sup>nd</sup> tab may be adequate for calculating trip costs.

- The **Budget and Final Financials** form includes an entry for **contingencies**. When preparing a budget for the trip, factor in all the small things that you know will occur and then add between a 5% and 10% contingency fee to cover price increases and unforeseen events (e.g., changes in outfitter prices, additional costs to address an emergency, or changes in foreign currency exchange rates).
- When determining prices for hotels and other components that have **taxes added**, be sure that the taxes are calculated and accounted for in the budget. The CMC is a 501(c)(3) organization and is exempt from State sales tax in Colorado and likely in other States as well. If you need documents to support the sales-tax free status of the CMC, contact your ATC Liaison.
- All tips should be covered in the budget.
- In your trip budget, you may include a reasonable amount for a **post-trip reunion party**.
- **Non-members** are charged a guest fee that makes the non-member price 10% higher than the member price (i.e., member price ÷ 0.9 = non-member price).
- AT Trip Leaders **renting cars or vans for transportation** of trip participants shall obtain, at a minimum, the collision damage waiver and \$1 million liability policy. Include the cost of insurance in your budget.
- For ease of doing business it is preferred that all insurance be obtained from the company providing the rental vehicle.
- All AT Trip Leaders who drive rental vehicles must hold a valid driver's license.
- To provide fairly priced trips to potential participants while promoting the strength of the Club brand, AT Trips shall be priced in a manner that is **reasonable and competitive**.
- **Leaders may be reimbursed**, for direct trip-related expenses. Reimbursable expenses only include those that are included in the participant's package. For example, leader will not be reimbursed for transportation costs or meals not included in the participant package. related expenses may include, but not be limited to:
  - Outfitter package cost
  - Ground costs including transportation
  - All or partial coverage of airfare
- In cases where a **Leader offers to subsidize a trip** by paying all or part of his/her expenses (or by adding any other funds)
  - The subsidy is to be paid at the time the offer is made (via check to the Club)



- The Club will recognize the subsidy payment as a **donation** and will record it accordingly
- The Club will send the Leader a letter acknowledging the donation
- The receipt/bill for the expense incurred by the Leader may be submitted to the Club for immediate reimbursement, or may be included when preparing the Post Trip Leader Reimbursement and the Final Cost of Trip column in the Budget and Final Financials Form in the Post-Trip Phase.

For example: Assume the cost of the leader's airfare is \$1,200 and a) reimbursement of this expense would make the trip price not feasible OR b) there are insufficient trip participants to cover this expense and trip cancelation is likely. The leader may want to contribute funds to help the trip to: a) be appropriately priced OR b) avoid trip cancellation. At the point in time when the leader agrees to contribute \$1,200 to make the trip feasible, the leader should make a \$1,200 contribution to the Club – noting that the donation is being made for the “AT Program”. When trip expenses are incurred, the leader should process a Request for Wire Transfer Check form for the trip expenses, including the expense for the leader's airfare.

**The benefit for the Club** is that there is no question that the donation is a cash charitable donation.

**The benefit for the Leader** is that they will receive a nice 'thank-you' from the Club (*i.e.*, like all other donations) and the donation will be included on the published list of donations in Club publications. So, if a Leader pays the \$1,200 (as in our example) the CMC donation list will include this Leader's name on the list of folks who donated more than \$1,000 **and** they will be included as a member of the Summit Society (donors of \$1,000 or more in a year).

The CMC appreciates when Trip Leaders contribute personal funds to offset the costs of their transportation or on-ground expenses for AT Trips (*i.e.*, in order to keep trip prices commercially reasonable for participants), as the CMC needs Trip Leaders to act as the official leader and represent the Club's interests during trips. In these cases, the CMC will provide a tax letters to the AT Trip leader for their cash donations (as described above). However, the CMC does not provide these letters to AT Trip Leaders for scouting trips. AT Trip leader's travel expenses during a scouting trip are often blended with personal travel. The CMC is not in a position to determine or ratify the portion of the trip that is personal versus for Club business.

Leaders are encouraged to use complementary trips provided by trip Outfitters, or frequent flyer miles, to help cover trip-related expenses. Leaders should be aware that the Club does not provide tax letters for the market value of donated frequent flier miles. Additionally, the Club



does not reimburse for expenses outside of allowable reimbursements when a Leader has chosen to use frequent flier miles for a trip.

### **Consider Non-refundable Deposits**

Carefully consider the amount of the non-refundable deposit. Too large an amount may discourage participants, while too small an amount may leave the CMC with unrecoverable expenses if a participant cancels. Be sure that your application packet provides information about the Club's refund policy.

When deciding the amount of your non-refundable deposit, also consider whether amounts that you send to an outfitter will be non-refundable, as the participant (*i.e.*, not the CMC) should bear any financial risk if the participant cancels.

### **Consider Your Cancellation/Refund Policy**

All announcements of trips shall state that they are subject to a cancellation policy. The cancellation form is a PDF document that may be signed electronically and emailed to the leader with the application and waiver document. This policy may be established by the Leader, but must be presented to the AT Committee for approval. The policy should be as specific as possible.

#### **The cancellation policy must conform to the Club guidelines below:**

- If the trip is canceled by the Club or by the Leader, all money collected from would-be participants, including any “non-refundable deposit” shall be returned. To prevent loss to the Club, the Leader shall minimize unrecoverable expenditures until it is reasonably certain that the trip will occur. The Leader should let participants know that the trip is likely to go, or is in doubt, as early as possible, so participants may purchase, or refrain from purchasing airline tickets.
- If a person cancels her/his participation in a trip for which she/he has registered and paid all or part of the fees, the Club shall return to that person funds in accordance with the policy that was signed at the time the participant registered for the trip. The amount of a refund may depend on whether a qualified replacement participant can be found.
- Generally, the CMC assumes the financial risk associated with trip cost overruns and the financial benefits associated with trip cost shortfalls. There may be some limited cases where a trip price may need to be advertised as a range of prices. These circumstances are typically for expedition-type trips or trips that require expensive permits that cannot be arranged/priced in advance of the trip approval/advertising timeframe.



### **Submit Photos To Help Market Your Trip**

Photos of your trip destination will be included on the CMC website and on materials advertising your trip. Here's some tips about what type of photos should be submitted to your ATC liaison:

- Add 2 or 3 high quality photos for your trip to the Trip's Google Drive folder.
- Photos should be from your own personal stash or other photos that are not subject to copyright violations (e.g., photos copied from commercial websites).
- Photos should capture the essence of your trip. Examples:
  - If the trip is an expedition, include people doing technical activities.
  - If the trip is about an exotic destination, include photos of the scenery
  - If the trip includes a high-point, include photos of groups that have summited the high-point on a previous CMC AT Trip to that destination
  - If the trip is a fun-filled group trip, include photos of groups that went to this destination on prior trips

### **Develop Your Participant Materials**

It is critical for potential participants to have a clear idea of what the trip is intended to deliver. This is conveyed in the following ways:

- A [Welcome Letter](#) that you will send to prospective participants who have indicated an interest in participating in the trip. The Letter should describe the parameters and expectations for the trip and include a summary of the itinerary for the trip.
- A detailed day by day [Itinerary](#) (this may be included within the Welcome Letter or as a separate document)
- An [Application](#). This is a PDF document that allows leaders and participants to fill in appropriate sections. There is a section at the end for Additional Questions the leader wants participants to answer that are specific to a given trip. This form does NOT need to be signed by the participants.
- A [Payment Schedule and Stub](#). The Schedule describes when payments are due and the amounts—this Schedule should be sent to prospective participants with the application, Welcome Letter and other trip documents. The Payment Stub is used by participants when they remit payments to the CMC.

### ***Step 4: Submit Your Proposal to the AT Committee***

NOTE: The Required for Proposal forms and any other required supporting documentation must be submitted **at least 6 months in advance of the trip**. When you've completed the documents



informed your ATC Liaison. Paper-based Packets and non-standard documents are not accepted. Committee members will make comments/remarks/suggestions, or ask for additional information, as needed.

### ***Determining the Final Trip Price***

Once your trip documents are submitted, the AT Committee will review the details of the trip and will determine the final pricing for the trip by adding an amount that covers CMC overheads and costs. This amount is not a standard percentage and will vary by a number of factors (including but not limited to AT projected cash flow requirements to support other AT Trips and other CMC activities, advertising and other marketing costs, facilities expenses, assistance with bookkeeping, mailings, and other clerical work, etc.). As the CMC and AT Committee wants to offer trips that are competitively priced, trip prices will not be set at a level that would make the trip no longer commercially viable.

This is a service that the AT Committee provides to AT Trip Leaders—it is not required for each and every trip or Leader to determine the final price of a trip. Trip Leaders are encouraged to work with the AT Committee and/or their trip Liaison when determining the final trip price, as each trip and trip is unique.

### ***Getting Approval for Your Trip***

New Leaders may be required to discuss trip proposals in person with the AT Committee and would schedule a time for this discussion through their AT Committee Liaison. Experienced Leaders may be asked to discuss a trip in person, as appropriate.

The AT Committee will inform you of their decision about your trip. Your trip may be approved, approved with conditions, or denied. If a Liaison has not been assigned prior to submission, the Committee will assign one when the trip is accepted or accepted with conditions. Any subsequent, revised submissions should be made with guidance from your AT Committee Liaison. The AT Committee reserves the right to withdraw approval for any trip that does not adhere to Club requirements and standards.

When a trip is approved, the AT Committee will notify the AT Marketing Coordinator and they will begin marketing the Trip.



## II. Pre-Trip Phase

The Leader must complete the Required after Trip Approval forms, including:

- Payment Schedule and Stub—Participants. Payment Stub to be sent to participants when applying for the trip and to be returned by participants to CMC with their payments. Submit to your ATC liaison.
- Request for Wire Transfer Check. Used by leaders to get reimbursements from CMC for trip expenses before going on the trip. Submit to your ATC liaison.
- Roster with Medical and Travel Details. This is a document for leaders to use on the trip listing each participant and their emergency contact info, travel itinerary, dietary requirements and medical issues. This form should also be submitted to the CMC Membership Services at [office@cmc.org](mailto:office@cmc.org) or [adventuretravel@cmc.org](mailto:adventuretravel@cmc.org) before the trip begins.

These two forms are optional, but may be useful in the trip planning process.

- Pre-Trip checklist. It's in the Trip Workbook tab called "13 - Pre-Trip Checklist". This checklist is for the benefit of you to help ensure that you have done everything you need to make your trip goes smoothly.
- Trip Travel and Outfitter Details. Used by leaders to compile all contact information (vendors, hotels, etc.) so the information is all in one place. While this form is not required, the information contained on the form must be submitted to Membership Service (at [office@cmc.org](mailto:office@cmc.org) or [adventuretravel@cmc.org](mailto:adventuretravel@cmc.org)) before the trip leaves.

### ***Step 1: Tell Club Staff about Advertising Your Trip***

The activities described in this section are not necessarily sequential and may be repeated as needed. Responses to questions should occur in a timely manner. Once the trip is approved, the trip will be advertised via a variety of CMC media channels. Leaders may be asked to work with AT Committee Staff Liaison to facilitate getting the trip advertised. The trip proposal should contain sufficient information for the various media outlets that the Club uses to advertise your trip. However, staff may want additional information or photos to help market your Trip. AT Committee Staff have access to a marketing template that could be used when designing fliers or brochures for a trip. Using this template helps to ensure that all CMC marketing materials have a consistent look and feel.



## ***Marketing Guidance For Trip Leaders***

The Trip Workbook has a Tab called “5 - CMC Website” that helps you organize the information about the Trip. CMC staff will use this to help market the Trip to Participants.

1. Submit all content and photos for website to Marketing 10-12 months in advance
  - a. Marketing will create the webpage
  - b. Marketing will create the Facebook page
    - i. Trip Leader is responsible for engaging on the Facebook event to encourage sign-ups
2. First Rucksack after posting the trip will include a “New AT Trip Announced”
3. First AT Newsletter after posting the trip online will also include a “New Trip” section
4. Trip Leader will submit a blog with personal stories and experiences from the location you are going with photos to marketing 8 months prior to the trip
  - a. We will edit and post on the blog 6 months out
  - b. Include new blog post in a Facebook event
  - c. If applicable, include on our social media pages to promote the trip
5. Inclusion in monthly Rucksack and AT Newsletter ranked by need as determined by ATC
6. Featured trip on website will be given to the upcoming trip with the most need, as determined by ATC
7. It is ultimately up to the trip leader to fill the trip with participants while all of these other promotional campaigns are ongoing

## ***Step 2: Select Your Participants***

Except for a few trips that do not need Leaders to evaluate potential participant's fitness or skill level (e.g., Yellowstone in Winter, the In-State Outing or the annual Centennial Canoe trip), all interested persons must apply for the trip through the Leader. Note that some trips may be particularly difficult or require technical skills, which may demand a more rigorous selection process. This may include training or “try-out” trips. It may be advisable for the Leader to maintain a wait list in case it becomes necessary to replace a participant. Send a Welcome Letter and a Participant Application (and any other information specific to your trip) to the interested person.

## ***Qualities Of An Excellent Participant***

- Ability to perform physical activity outdoors for a full day
- Ability to load and unload camping gear from boats



- Willingness to travel at group pace and participate in group activities including \_\_\_\_\_
- Passport valid for 6 months past return date
- Willingness to help prepare and eat communal meals
- Ability to function as a team member supporting, assisting, and encouraging others
- Hiker C classification within CMC or equivalent experience
- Experience hiking in crampons and with ice axe
- Experience hiking to elevations above 14,000'
- Current physical ability to hike full days at high elevation
- Participation in Pre-trip Activities
- CMC High Altitude Mountaineering School graduate, or equivalent training
- Ability and willingness to hike 10 plus mile days in humid rainforest conditions
- Willingness to sleep in rustic dormitory style jungle housing
- Willingness to travel with minimal luggage
- Willingness to participate in volunteer work

### ***Who May Participate in CMC Trips***

- **Qualified applicants**, selected/accepted on a first-come, first-served basis
- **Non-Club members.** Every effort should be made to encourage non-members to join the Club, thereby avoiding the non-member price, which allows for a 10% discount for members. Non-Club members are required to sign the Guest Release of Liability waiver.
- **Anyone belonging to one of the following** organizations may attend AT Trips at the CMC member rate (participants must sign Guest Release of Liability waiver):
  - Adirondack Mountain Club
  - American Alpine Club
  - Appalachian Mountain Club
  - The Mountaineers
  - The Mazamas

### ***Declining a Participant***

A Leader has the option to decline a prospective participant for a trip. However, please keep in mind the Club's Non-Discrimination Policy:

*"All persons participating in Club activities are expected to treat all others with respect and concern. The Colorado Mountain Club will not tolerate abusive, sexually harassing or discriminatory actions or communications. Anyone experiencing or witnessing such behavior is invited to submit a written complaint to the Club Chief Executive Officer or*



*President for investigation. Consequences of inappropriate behavior may include a verbal warning, written warning, suspension, or expulsion from the Club."*

When a prospective participant may be denied participation (except for those that will be denied due to a lack of requisite technical skills or physical conditioning), you must consult with your AT Committee Liaison before making a final decision.

## **Step 3: Notify Accepted Participants**

Once you've made a decision about a potential participant, you should:

- Notify him/her that he/she is accepted or declined, as soon as possible. If a potential participant is declined, be sure to clearly indicate the reason for declining them.
- Direct accepted participant to immediately submit deposits (including a [Payment Stub](#)) to the Club office to confirm their participation on the trip. Inform accepted participants that they are not fully accepted until their deposit has been received by the Club. Accepted participants that do not make their deposits in a timely manner may be at risk of losing their spot on the trip.
- Advise Participants that they may want to consider Trip Insurance. Participants should consider whether to insure for airfare, trip cancelation (e.g., for medical reasons, loss of employment, family emergencies, etc.), medical evacuation, and other trip-related costs.

### ***Remind Participants to Submit Their Payments on Scheduled Due Dates***

Please have all trip participants make payments to the Club office, accompanied by the Payment Stub. Any payment sent to the Leader in error should be forwarded to the Club bookkeeper in a timely fashion.

### ***Advise Participants to Make Air Travel Arrangements***

**Participants must purchase their airfare directly**, and not through the Club or Trip Leader. A Trip Leader may recommend a travel agent to participants. A situation where airfare within a destination country is part of an Outfitter package must be specifically approved in advance by the AT Committee.

When considering when to suggest that participants book their flights, bear in mind that for the cheapest fares, flights often must be booked some months in advance. The Leader may find it convenient to work with a travel agent to arrange flights, look for bargains, and allow



participants to travel together. Trip leaders should not recommend that participants buy their airfare until the trip is not at risk of being cancelled.

### ***Assist Participants to Get Visas or other Documentation***

Allow ample time to apply for visas. Many nations require participants to send their passport to the host nation embassy or consulate for processing. If the trip involves travel in multiple countries, the process of collecting visas can become remarkably long.

## ***Step 4: Get Cash Advances or Transfer Money to Vendors as Needed***

### ***Cash Advances***

Some trips require significant cash funds that need to be paid during the trip. When submitting a Request for Wire Transfer Check form for a cash advance, provide documentation support such as an Outfitter or transportation invoice or trip cost estimate.

You can receive a cash advance before a trip leaves, and then submit receipts after returning from the trip. Use the Request for Wire Transfer Check form to request the cash advance, making sure to carefully document the need for the expense. Such an advance is limited to 80% of the anticipated (budgeted) expenses. You will be held fully responsible for that money. For your own safety, pay as much of the trip on credit cards as possible and divide cash among several members of the group. Another way to limit the amount of cash that you will need to take on the trip is to pay vendor costs in advance, whenever possible.

### ***Transfer Money (Wire)***

Some trips require that outfitters/vendors be paid in advance of the trip. The outfitter/vendor may request that money be transferred (wired). In this event, Leaders may use the Request for Wire Transfer Check form.

Leaders must provide the following information at least 2 weeks prior to the date payment is needed:

- Trip name and start date
- What the payment is for
- The amount needed
- Name and address of vendor
- Name and address of bank



- Wiring instructions, including swift code or I-band (depending on the country); vendor should have the detailed wiring instructions

Note: If the payment is under \$10,000, it requires only **one** signature from an authorized signer for the Club. Payments over \$10K require **two** signers and take at least 2 weeks. Also, CMC needs further advance notice for larger payments in order to ensure adequate cash is on hand.

## ***Step 5: Conduct Pre-trip Activities***

Leaders may find it useful to conduct pre-trip activities, such as a planning meeting, pre-trip training/conditioning hike or climb, or some type of qualifying exercise. It's best to conduct pre-trip planning/information meetings at CMC offices. Contact the CMC Membership Services to arrange a meeting room and time that's convenient for the majority of your trip's participants (or all, if that's possible!). All pre-trip team building and training/conditioning hikes and climbs organized by AT Trip Leaders for the trip participants need to be entered in the official Club activity schedule in order to be covered by the Club's liability insurance.

### ***On-going: Communicate Regularly with Participants and your AT Committee Liaison***

In addition to providing email updates, you are encouraged to arrange and carry out pre-trip meetings, conditioning trips, skills refresher trips, and/or "get-to-know-you" hikes. Provide any travel tips you feel are useful and appropriate to trip participants.

If a Leader becomes aware that trip costs may substantially exceed the initial budget, the Leader should contact his or her AT Committee Liaison to consider potential alternatives. Alternatives could include modifying trip inclusions or price, cancelling the trip, absorbing cost overruns with other Club AT Trips, among others. Raising the price of the trip should not be considered as an alternative.

### ***Before Departing - Tell The AT Marketing Coordinator***

The Participant forms include:

- Participant Application with their emergency contacts and phone numbers, which would allow the Club to contact the participants' next of kin.
- Copies of the signed Cancellation form from each participant's Application.
- Copies of the signed Waiver form from each participant's Application.
- The Roster with Medical and Travel Details form is for leaders to use on the trip listing each participant and their emergency contact info, travel itinerary and trip logistics



including lodging phone numbers (in case the Club needs to contact the leader during the trip), dietary requirements and medical issues.

### ***If The Leader Must Cancel A Trip***

If a trip Leader must cancel a trip for any reason, the Leader should contact his or her Liaison to discuss why the trip is being canceled. If time permits, the Liaison could possibly help to find another Leader to help lead the trip. Also, the Leader is required to write an email explanation to the trip participants explaining why the trip is being canceled and offer other trips for that calendar year as a suggestion for them to participate in as an alternate option. Full refunds will be issued to all trip participants.

### ***Emergency Preparedness***

You should recognize that emergencies can quickly become dire, especially in remote areas of developing countries. You and the trip participants should give careful thought to possible emergency situations, and how to respond, by developing a Risk Assessment First Aid plan prior to your departure.

Leaders are encouraged to discuss potential emergency situations with their AT Committee Liaison before departure, and to develop response plans together.

### ***Develop a Risk and First Aid Plan***

Here are some things to consider when developing a Risk Assessment and a First Aid plan. A full discussion of risk assessment and first aid issues are beyond the scope of this Guide.

NOTE: The Risk and First Aid Plan lives in Tab 6 - Risk Management of the Trip Workbook

#### **Gear and Resources**

- **What first aid gear does your trip require** (e.g., group first aid kit, individual first aid kits, expanded Leader first aid kit, other medical supplies specific to your type of trip)? If items are spread out among the group or carried by 1-2 persons, is everyone in the group aware of who has what?
- **What are the first aid resources** for your trip? For example are you or one of your participants medically trained? Alternatively, does your Guide or Outfitter provide medical or first aid support?



### **Treatment and Response**

- Based on the medical information provided by each participant (e.g., prescription drugs, pre-existing conditions, recent surgeries), **what is your plan to handle situations** related to this information?
- If there is an incident requiring first aid treatment of a serious nature, especially if there is no medical professional in the group, **who will be in charge of the scene and treatment?** If you are engaged in making arrangements for care, who will be responsible for monitoring the patient? Monitoring may include something more than passive observation, such as taking oxygen saturation or blood pressure.
- **What health care issues of a serious nature may arise on the outing** (e.g., AMS, HAPE on a high altitude expedition; heat stroke at lower elevations on hot days; others)?
- What types of emergencies **can be dealt with by the group** or by in-country facilities?
- **Who should be contacted?** For example, do you know how to contact the local Outfitter's office, local medical or police authorities, or the U.S. Consulate, as appropriate?
- In what situations will the trip be allowed to continue, and when will it be ended mid-trip?

### **Evacuation/Rescue**

- **What is the plan if an evacuation becomes necessary;** will the plan be self-supported from the group or dependent on a Guide or Outfitter?
- Who will make the final decision regarding the need for evacuation?
- If the plan is self-supported, **do you have the necessary phone numbers to obtain needed assistance for evacuation** (e.g., embassy, local climbers' organization, other contact at a lower elevation, etc.)?
- If there is no phone coverage, **who will go for help** (at least two persons) and to where?
- If medical treatment beyond first aid is needed, **where is the nearest clinic or hospital?**
- **How will the evacuation and any subsequent costs for treatment be funded?** Consider that participants with evacuation and treatment insurance may need to pay those costs up front, and then seek reimbursement from their insurance provider.
- Who will leave the outing, and incident site, to escort the patient, if escort is necessary?

If a life-threatening emergency occurs on the trip, you or a designated participant should notify the Club's Emergency Call Service at **269-384-1056** as soon as possible.



### **Leadership Protocol in an Emergency**

You should also give careful thought to how to handle the situation if you should become injured or incapacitated. Some questions for consideration include (this is not an exhaustive list and will depend upon the nature of your trip):

- **Who will decide whether the trip shall continue** or end at the point you become injured or incapacitated?
- If the trip will continue, **who will have the phone numbers, knowledge of where money is kept, and information** regarding any Guide/Outfitter services being provided in order to replace you?
- **How will you select a replacement** and integrate that individual into the planning?



## III. Trip Phase

The full breadth of this topic is well beyond the scope of this document, however, a few items to keep in mind while the trip is in progress are noted below.

### ***Manage the Trip Finances***

Club policy is that **receipts must accompany all claims for reimbursement**. It is advisable that the Leader carry a small [Receipt Book](#) in which expenses may be entered and signed by the payee. Alternately, the Leader may enter expenses into the [Expense Report](#) form as expenses are being incurred. There may be some expenses for which receipts are not available (e.g., tips and gratuities), and those expenses may be included in petty cash. A careful log must be kept of petty cash items.

### ***Lead The Trip***

A full discussion of trip leadership is beyond the scope of this document. Recall that trip Leaders are seasoned, fully-qualified persons as described in the Trip Leader definition.

As a trip Leader, you are a representative of the Colorado Mountain Club. As such, you are expected to behave according to high standards of personal conduct. You shall:

- Behave with respect for all participants of the group
- Establish your authority as the Trip Leader within the group according to guidelines provided by the Club
- Address participant concerns, questions, or suggestions in a timely and appropriate manner
- Hold periodic briefings to keep participants informed about upcoming events and activities
- If conflicting personalities on a trip cause problems, you will make every attempt to control and solve these situations

### ***Unacceptable Trip Leader Behavior***

- Highly personal discussions (e.g., religion, politics, gossip, or offensive topics) that could be regarded by some trip participants as inappropriate



- Inordinate or highly personal attention to any one member of the group over the others
- Use of foul language
- Excessive drinking
- Drug use

#### Dealing With Difficult Participants

[Leader Guides and Manuals]



## IV. Post-Trip Phase

The Leader must complete the Post-Trip forms in the steps below.

### ***Step 1 - Notify Your Liaison The Trip Is Complete***

The AT Committee Staff Liaison will send an electronic Trip Evaluation to the participants. Results will be reported to the AT Committee and to the Trip Leader.

### ***Step 2 - Complete The Post Trip Forms***

- [Post Trip Leader Reimbursement](#) - Sent to CMC Accounting by leaders to get a final reimbursement from CMC for trip expenses after the trip is completed. This is optional, only use it if you need reimbursement. All requests for reimbursement must include the original receipts or bills, and must be submitted on the Post Trip Leader Reimbursement form. Be aware that the Club Accounting Department requires up to 14 days to process checks exceeding \$3,000. All receipts should be itemized. Credit card receipts alone are not acceptable.
- [Post Trip Report](#) - A report by the leader about how the trip actually went. All sections should be complete with any relevant information. Complete the "Final Costs of Trip" column in the Budget and Final Financials worksheet and send to your ATC liaison within 45 days of the trip completion. This should include all the cost of the trip, both prepaid and included on the Post Trip Leader Reimbursement.
- Final Financials - Complete the "Final Costs of Trip" column in the [Budget Financials](#) worksheet and send to your ATC liaison. This should include all the cost of the trip, both prepaid and included on the [Post Trip Leader Reimbursement](#).
- Photos and blogs from Trip Leaders and participants submitted to marketing no later than 2 weeks after the Trip. Marketing will utilize the content to create social posts and blogs and point people to upcoming AT Trips.