



LEADER'S REFERENCE BOOK

Leadership Training Program

Sixteenth Edition, February 2006
Leadership Training Committee
Angeles Chapter, Sierra Club

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Leadership Training Program

The Leadership Training Program (LTP) consists of an introductory one-day seminar and a series of practical studies, field exercises, and evaluations conducted under the jurisdiction of the Leadership Training Committee (LTC), which prepares candidates for leadership of Angeles Chapter outings. Successful candidates are certified by the Chapter Safety Committee at one of four leadership levels designated as O, I, M, and E.

O-level outings are limited to Class 1 terrain (walking/hiking) and include nature walks, conditioning hikes, day hikes, and overnight backpacks on trails that require only minimal navigation skills. O-level outings comprise the majority of Angeles Chapter activities.

I-level outings require navigation skills for significant off-trail travel, which may include Class 2 terrain (occasional use of the hands for balance).

M-level outings include skills for leading Class 3 rock climbs (frequent use of hands for upward progress) and moderate snow climbs, which may require the use of an ice axe and crampons, as well as navigation skills.

E-level outings add skills for leading Class 4 rock (consistent use of the hands for upward progress and more exposure to falling) with a rope, anchors, protection, and belays; steep snow climbs that require the use of ice axe and crampons and may require roped travel and belays; and advanced navigation, which may require the use of an altimeter.

PREREQUISITES

Prior to becoming provisional leaders, LTP candidates need to meet these requirements:

1. Current Sierra Club membership
2. Participation in five Angeles Chapter Sierra Club trips
3. Backpacking skill (for categories I, M, and E)
4. Mountaineering skill equivalent to that expected of a Sierra Peaks Section Mountaineers List member (or categories M and E).

Current Sierra Club Membership

Information on Sierra Club membership may be obtained by contacting

Sierra Club National Office
85 Second St., 2nd Floor
San Francisco, CA 94105-3441
(415) 977-5500
Internet: www.sierraclub.org

Angeles Chapter Headquarters
3735 Wilshire Blvd., Suite 320
Los Angeles, CA 90010-1819
(213) 387-4287
(213) 387-5383 (fax)
Internet: www.angeles.sierraclub.org

Angeles Chapter Orange County Office
230 East 17th St., #206
Costa Mesa, CA 92627
(949) 631-3140
(949) 631-3129 (fax)

Leadership candidates must maintain their Sierra Club membership. Although most of the Angeles Chapter's outings are open to all qualified participants from the general public, only club members may lead outings.

Participant Experience Trips

Prior to leading provisional outings, candidates must have participated on five Angeles Chapter outings at the O level or higher. These experiences provide candidates the opportunity to observe the mechanics of outings leadership and to become familiar with Chapter outings and procedures. Participation on trips with various leaders can help candidates to develop a sense of their own leadership skills and style, possibly cultivate a relationship with a leader mentor, and provide introductions to those who may serve as assistant leaders and evaluators of the provisional leaders. As a result, a maximum of two regularly occurring conditioning hikes or the like may be counted toward the experience trip requirement. For I, M, and E candidates, at least three of the five outings must be at or above the leadership level the candidate is seeking. For I level at least one of the outings must include wilderness travel with overnight backpacking. For the M and E levels at least three of the outings must include wilderness travel with overnight backpacking. Outings such as lectures, picnics, or workshops do not qualify. The Wilderness Travel Course (WTC) snow camp or Joshua Tree weekend qualifies (but not both and

neither the conditioning hike nor the snow travel day). The LTC Chair may grant equivalent credit for trips other than scheduled Angeles Chapter Sierra Club trips. Those asking for such credit should attach a statement to their LTP enrollment application explaining the situation.

ENROLLMENT

Application

An application for enrollment in the LTP can be obtained by mailing a request, together with a self-addressed stamped envelope (sase), to the LTC Registrar (listed in the *Schedule of Activities*) and on the LTC home page (www.angeles.sierraclub.org/ltc). An application may also be found in the ad toward the back of the *Schedule of Activities*. At least two weeks prior to the seminar, the completed application must be mailed with the registration fee to the registrar.

Registration Fee

The registration fee for the LTP is \$25, which includes a copy of the *Leader's Reference Book* (LRB). The fee also includes a leader recognition patch identifying the leadership level, which is issued to successful candidates by the Safety Committee with a leader's certificate.

Pre-Seminar Examination

After receiving the application and registration fee, the LTC Registrar will mail the applicant a copy of the LRB and pre-seminar examination, designed to assure that applicants have a minimum level of familiarity with information contained in the LRB. As a condition of admittance to the seminar, the applicant must present the completed examination to the registrar at the seminar.

Seminar

The LTC presents two one-day Leadership Training Seminars each year, one in April and the other in October. Candidates begin the LTP by attending one of these seminars. The location and dates of these seminars are listed in the Angeles Chapter *Schedule of Activities*, which is published three times a year and provided free to chapter members, and may also be found on the LTC home page at www.angeles.sierraclub.org/ltc. The *Schedule* and LTC home page are valuable tools for leadership candidates.

Leadership Levels

At the seminar registration, applicants will identify the leadership level that they are seeking: O, I, M, or E. The choice will depend on the level of outings one intends to lead. If qualified, one can begin the LTP as an E-level candidate; there is no requirement to obtain certification in succession. Candidates may, however, obtain progressive certifications without repeating similar requirements and without additional fees (but receiving only one patch); one simply completes those unique requirements of the next level. Once certified at a specific level, leaders may conduct outings at or below that level for a sponsoring group, section, or committee. Additional patches may be purchased from the Safety Committee for \$3 each.

LTP Calendar of Events

The LTC maintains a Calendar of Events, listing dates for LTP practical studies and field exercises that candidates may use to schedule and complete their requirements for leader certification. At the seminar candidates will receive a current copy of this calendar, and they may see updates of the calendar on the LTC home page or receive one by sending a sase with a request to the LTC Outings Coordinator, who is listed in the *Schedule* and on the LTC home page.

Leader's Reference Book

The *Leader's Reference Book* is normally included as part of seminar registration, but it also is available to rated

leaders and previous LTP enrollees by mail. Please contact the LTC Registrar for current price and purchasing.

COMPLETION REQUIREMENTS

The LTC Administration Chair maintains a progress file for each candidate with documentation of completed requirements. Upon the candidate's successful completion of all requirements, the Administration Chair forwards the file to the Safety Committee with a recommendation for certification.

Summary of Graduation Requirements

Graduation from the LTP requires that the enrollee complete the steps identified in Figure 1-1 below. Detailed requirements for each step are given in the LRB chapter indicated. The LTC may change these completion requirements, including the specifics of the technical checkouts, at any time and may require candidates to comply with the new changes.

First Aid

All candidates must have a current certification for an American Heart Association, American Red Cross, or equivalent one-person adult (or higher) cardiopulmonary resuscitation (CPR) course. O-level candidates need current certification from a four-hour minimum American Red

REQUIREMENTS	O	I	M	E
Seminars (Ch. 1)	One day	One day	One day	One day
First Aid (Ch. 5)	CPR, Standard First Aid	CPR, Wilderness First Aid	CPR, Wilderness First Aid	CPR, Wilderness First Aid
Environmental Awareness (Ch. 1)		Two days	Two days	Two days
Technical Checkouts				
Navigation (Ch. 6)		I/M Navigation	I/M Navigation	E Navigation
Rock (Ch. 7)			M Rock	E Rock
Snow (Ch. 8)			M Snow	E Snow
Final Exam			Yes	Yes
Approval by Provisional Lead Committee			Yes	Yes
Leader Provisional Trips (Ch. 1)	One	Two	Two*	Three*

*All E outings and any M outings using rope and/or ice axe must be approved by the national club's Mountaineering Oversight Committee. See p. 7 for more information.

Figure 1-1. Summary of LTP graduation requirements

Cross or equivalent standard first aid course. Candidates at the I, M, and E levels need to complete a certified twenty-four hour (minimum) wilderness first aid course. For LTP purposes first aid, wilderness first aid, and CPR are considered current for four years. If a candidate's certification for CPR, standard first aid, or wilderness first aid expires before completion of the LTP, including provisional leads, the candidate will need to repeat the requirement to be current with certification. If an I or M leader chooses to become an M or E, he or she must have current certification in wilderness first aid and CPR or will need to repeat these requirements.

Environmental Awareness

Angeles Chapter leaders may conduct outings in such diverse ecological areas as the Sierra Nevada mountains, the Mojave Desert, the Angeles National Forest, Griffith Park, or Malibu beach. The environmental awareness training requirement for I, M, and E candidates is intended to enrich the leader's knowledge and appreciation of the natural environment. As models for their trip participants, leaders should have a general awareness of the natural environment in which they travel and practice "leave no trace" environmental ethics.

Candidates should choose environmental field study programs that are specific to the area in which they intend to lead outings. The Angeles Chapter's Natural Science Section

conducts a Nature Knowledge Workshop each year in late spring and several Field Ecology Workshops throughout the year. These workshops are listed in the *Schedule* and on the Natural Science Section's home page at www.angeles.sierraclub.org/nss. The *Schedule* usually lists several field study programs conducted by Groups, Sections, and Committees that are specific to nature and environmental study and may satisfy part or all of this requirement. In addition, college, university, or university extension natural science field study courses are excellent sources for specific education about our diverse California ecology. For example, community colleges often offer two-day field study courses, such as Geology and Natural History of the Eastern Sierra and A Field Study of Desert Birds, which provide appropriate environmental awareness training. The LTC Chair and the LTC Administration Chair are authorized to approve the method of satisfying this requirement. Candidates must provide the Administration Chair with documentation identifying a minimum of fourteen hours of environmental awareness training.

Technical Checkouts

The LTC chair appoints a Technical Chair for each of the three disciplines of navigation, rock climbing, and snow climbing. The Technical Chairs are members of the LTC and are responsible for the technical requirements and checkouts for each leadership level in their discipline. The Technical

Chairs schedule and conduct practice and checkout outings, which are listed on the LTC Calendar of Events and in the *Schedule*. These checkout requirements are detailed in the relevant chapters of this book.

The LTC Chair and the respective Technical Chairs appoint examiners who are authorized to checkout candidates for the applicable technical requirements for each leadership level. All of the examiners are authorized for the M level with a more restricted set usually for the E level. With prior approval of the Technical Chair, examiners have the authority to perform a checkout at times or places that they deem proper, and they may also grant a checkout based upon direct personal knowledge of the enrollee's skill. The preferred method of obtaining checkout, however, is for enrollees to attend a scheduled checkout sponsored by

ABBREVIATIONS

A number of abbreviations are used in the Leader's Reference Book, many of them familiar and some probably not so familiar to prospective leaders.

DPS	Desert Peaks Section
Excom	Executive Committee of the Angeles Chapter
GCO	Group and Chapter Outings (also called Regional Outings—National Sierra Club)
GPS	Global Positioning System
GSC	Group, Section, or Committee of the Angeles Chapter
HPS	Hundred Peaks Section
LRB	Leader's Reference Book
LTC	Leadership Training Committee
LTP	Leadership Training Program
MOC	Mountaineering Oversight Committee (National Sierra Club)
OMC	Outings Management Committee
ROLM	Regional Outings and Lodges Manager (National Sierra Club)
SPS	Sierra Peaks Section
USGS	United States Geological Survey
UTM	Universal Transverse Mercator (mapping coordinate system)
WTC	Wilderness Travel Course or Wilderness Training Committee

the LTC or some other group, section, or committee. The Technical Chair has the final approval of an LTC checkout.

Although candidates may apply for and attend as many practice outings as they wish before attempting a checkout, they may not practice and attempt a checkout on the same day. Candidates who fail a technical checkout two times in one year must wait one year before attempting the same checkout again so that they have time to learn and practice the appropriate skills.

Technical checkouts are designed to do more than just test skills. In each of the checkout exercises, examiners will also be assessing the candidate's knowledge of the material, preparation and execution, ability, judgment, and leadership qualities. Candidates must not only perform the exercises at an appropriate skill level, but also must demonstrate an understanding of how they work and why they are important, as well as an ability to communicate those concepts to others.

Upon successful completion of a technical checkout, the Examiner will notify the Technical Chair, who will then mail a certificate of completion to the candidate. The Technical Chair will notify the Administration Chair that the candidate has completed the requirement at a specified leadership level. The examiner is also charged with giving an enrollee a written notice of satisfactory completion, which should be kept as insurance against some breakdown in internal LTC communications.

Final Examination

Candidates for the M and E levels must complete a final written examination before leading provisional outings. The exam, which may be requested from the Administration Chair at any time after attending a seminar, is completed at home and submitted to a designated LTC member for evaluation. If the exam is satisfactory, the evaluator will return the exam with comments to the candidate and notify the Administration Chair that the candidate has successfully completed the exam.

Provisional Lead Committee

When M- and E-level candidates have completed the requirements to become provisional leaders, they must send the LTC Chair their snow- and rock-climbing resume, preferably in the form of an e-mail. The resume should detail M and E climbs (Angeles Chapter outings or their equivalent) of the last three years, as well as list Sierra Club number, contact information, and dates for passing the technical checkouts or completing other requirements such as wilderness first aid. For the climbs, give dates, leaders, technical difficulty level, and route information if

known. The Provisional Lead Committee—the LTC Chair, Vice-chair, Rock Chair, Snow Chair, and Navigation Co-chairs—will approve or disapprove the potential leader to lead provisional trips based on what it considers sufficient experience in the kinds of trips that Angeles Chapter M and E leaders typically lead. A candidate may be asked to gain more experience before proceeding to the provisional stage. After completing their provisional leads, M and E candidates will be approved by the Provisional Lead Committee for submission to the Safety Committee for certification or may be asked to lead additional provisionals. Completion of checkouts, provisional leads, and tests and the taking of required courses are not an indication of automatic submission for certification to the Safety Committee. Because becoming an Angeles Chapter leader is a privilege, not a right, the LTC reserves the right not to approve a potential leader if it deems that the candidate lacks sufficient leadership qualities such as judgment, character, and the ability to work with people.

Provisional Outings

Once a candidate has satisfactorily completed all of the requirements aside from provisional outings, the Administration Chair will notify the Safety Committee, which will recognize the candidate as a provisional leader. The candidate may then submit proposals for provisional outings.

Conducted in accord with the chapter's Rules of Conduct and Safety Policy, Angeles Chapter outings are sponsored by specific groups, sections, and committees (GSC), which are listed in the *Schedule* with their officers and focus. Having completed their five prerequisite outings if not more, provisional leaders will be somewhat familiar with at least one of the GSCs, and some candidates may have already enjoyed long membership in one or more of them. At any rate, provisional leaders need to identify with or become members of a GSC that sponsors the type of outings at the leadership level that they intend to lead. The outings chair of a GSC, moreover, can help provisional leaders choose appropriate trips, seasons in which to conduct them, and assistant leaders.

I- and M-level provisional outings should be planned so that they are representative of the higher end of a leadership level. Because outings that barely meet the minimum standard do not provide leaders with adequate opportunities to test their leadership potential nor allow for a thorough assessment of the provisional leaders by their evaluators, such outings will not be accepted. If provisional leaders have any doubts about their proposed outings' meeting the criteria for their level of leadership, the LTC Chair and chapter Safety Committee Chair can review and approve the

outings. I trips (and M and E trips for provisional leaders who are not already rated I or M) must include a significant amount of off-trail wilderness travel and require significant navigation skill. Hiking a trail to within a few hundred feet of a visible peak and then walking to the summit do not meet the test of navigating and route finding.

Once provisional leaders have planned their outings and obtained an assistant leader to evaluate them, they submit their outing proposals, identified as provisional, to the outings chair of the sponsoring GSC. Upon approval of the trips, the outings chair then submits the outings for publication in the *Schedule, Southern Sierran*, newsletter of the GSC, or other publication. The LTC Provisional Lead Committee gives final approval for M- and E-level provisional leads. Some M- and all E-level outings also require approval by the Mountaineering Oversight Committee (see page 7 under Restricted Mountaineering Outings).

Provisional leaders must conduct their outings with an assistant or evaluating leader who is currently an active chapter leader and has been certified at or above the level of the outing for a minimum of two years. Assistant leaders should not be so familiar with provisional leaders that an impartial evaluation might be compromised. In addition, the evaluating leader must be fully capable of conducting the outing and have the authority and responsibility to assume leadership of the outing at any time if the evaluating leader believes that the safety or well being of the group is being jeopardized by actions of the provisional leader. The assistant leader will observe and evaluate the provisional leader and provide him or her with a written performance assessment. After completing the outing, the provisional leader submits this Assistant Leader's Report and the Provisional Leader's Self-evaluation Report to the Administration Chair. Because provisional leaders are not expected to exhibit the same level of leadership maturity, poise, and group management skills as that of a seasoned leader, the comments offered by the evaluating leader are an important part of the provisional trip experience.

Provisional leaders must select, plan, and lead their provisional outings, including preparing proper write-ups for publication in the chapter *Schedule* or other publication. Provisional leaders need to research and plan their own trips and should not copy standard trips to over-used places. In preparing and leading outings, provisional leaders need to do such things as

- research and select a destination
- select a date and acquire a wilderness permit if necessary
- obtain the map(s) and plan the route
- graph a trail profile and compute a time and distance table
- obtain an assistant leader to evaluate the

provisional leader

- write and submit the trip write-up for publication
- interview, screen, and select participants
- write and mail outing information to participants
- introduce themselves and identify the outing requirements and objectives to the participants
- lead the way and set the pace
- navigate off-trail with map and compass (for I, M, and E trips)
- find a route on difficult terrain
- choose campsites and manage the group
- make decisions with respect to objective and subjective hazards, changing conditions, accidents, injuries, and other emergencies
- know their own ability and that of the group and stay within the realm of capability.

These and other leadership skills are detailed in subsequent chapters. The provisional leader will follow the outings rules for the GSC sponsoring the outing. All outings require that leaders and participants sign the standardized nationwide sign-in/waiver sheets, one used for O-, I-, and non-restricted M-level trips and the other for restricted M- and E-level outings. Trips, furthermore, need to have participants to count as a trip: the provisional leader, a close friend, and the assistant leader do not make a trip.

The O-level requirement is to lead one outing that is rated O. The trip must be a unique trip planned and conducted by the leader candidate, not a regularly occurring event such as a conditioning hike to the usual destination. The trip must be listed in the Angeles Chapter *Schedule of Activities*, the *Southern Sierran*, or in a periodic newsletter of an Angeles Chapter GSC. The trip write-up must include the names of the provisional leader and the assistant leader.

The I-level requirement is to lead two trips that are rated I. Both must include a significant amount of off-trail wilderness travel and be of a nature that requires significant I/M-level navigation. (Travel over snow is considered off trail.) One trip must be an overnight backpack; the other may be a full day trip or a trip of two successive days with overnight car camping. At least one trip must be listed in the *Schedule*; the other may be listed in the *Southern Sierran* or a newsletter of a GSC.

The M-level requirement is to lead two trips that are rated M. If the provisional M leader has significant backpacking experience, one of the trips may be a day hike; otherwise, both must be backpacks. If the leader isn't already an I-rated leader, both outings must entail significant off-trail wilderness travel of a nature that demands I/M-level navigation. One outing must include a snow climb of at least 400 feet of elevation gain on a slope between 25 and 35 degrees that requires the use of an ice axe. One trip must include at least 100 feet of Class 3 rock climbing. One

outing must be published in the *Schedule*; the other may be published in a GSC newsletter or the *Southern Sierran*.

The E-level requirement is to lead three scheduled outings at the E level. Two of the outings must have significant off-trail wilderness travel demanding I/M-level navigation unless the provisional leader is already an I- or M-rated leader. At least two outings must be overnight backpacks; the other may be a full day outing or two successive days with overnight car camping. One outing must include a snow climb of at least 800 feet of elevation gain on a slope between 35 and 45 degrees on hard snow, requiring the use of ice axe and crampons. One must include at least 200 feet of Class 4 rock climbing that requires the use of ropes and belays. At least two outings must be published in the *Schedule*; the other may be listed in a GSC newsletter or the *Southern Sierran*.

TWO OUTINGS NOTES

WTC Experience Trips

Wilderness Travel Course (WTC) students are not trained for trips at the M or E level, and thus M- and E-level provisional trips should not be led as WTC experience

trips. (Students need to complete several outings in order to be graduated from WTC.)

Restricted Mountaineering Outings

All E-level and many M-level outings—provisional or otherwise—fall into the category of Sierra Club restricted outings. Any outing requiring the use of ice axe, crampons, or a rope is by definition a restricted mountaineering outing. Open to Sierra Club members only, restricted outings have special approval requirements controlled by the national club and its insurance carrier and subject to change. Provisional leaders can get current details on leading a restricted outing from the outings chair of the sponsoring GSC. Chapter 3 has further information regarding Sierra Club insurance. Applications for restricted mountaineering outings may be found in Appendix C and at the LTC website: www.angeles.sierraclub.org/ltc/forms.html

LEADER CERTIFICATION

Upon a candidate's successful completion of the LTP requirements listed above, the LTC may recommend the candidate for certification to the chapter Safety Committee.

PROGRESS CHECKLIST

The checklist below is a summary of completion requirements and may help candidates keep track of their progress.

Sierra Club membership renewal date: _____

CPR date: _____ Agency: _____

LTP seminar date: _____

Standard First Aid (O) date: _____

Angeles Chapter participant experience trips:

Wilderness First Aid (I, M, E) date: _____

	Date	GSC	Level	Destination
1.	_____	_____	_____	_____
2.	_____	_____	_____	_____
3.	_____	_____	_____	_____
4.	_____	_____	_____	_____
5.	_____	_____	_____	_____

Agency: _____

Environmental Awareness (I, M, E) date: _____

Environmental Awareness (I, M, E) date: _____

Final Exam (M, E) date: _____

Provisional Outings:

Technical checkouts:

	Date	GSC	Level	Destination	Evaluator
1.	_____	_____	_____	_____	_____
2.	_____	_____	_____	_____	_____
3.	_____	_____	_____	_____	_____

	Date	Level	Location	Examiner
Navigation:	_____	_____	_____	_____
Rock:	_____	_____	_____	_____
Snow:	_____	_____	_____	_____

1. _____

2. _____

3. _____

Notes: _____

Provisional Lead Committee Approval (M&E) date: _____

Successful completion of the LTP, however, does not guarantee certification. Only the Safety Committee can certify candidates to lead outings for the Angeles Chapter. The LTC Chair or the Safety Committee may require candidates to gain more experience, develop higher technical and/or leadership skills, or lead additional provisional outings before being certified at a specific leadership level.

PROGRESS

Leadership candidates set their own timetable for completion of the LTP. If no progress has been made in twenty-four months, however, their files will be made inactive. Reinstatement to active status is at the discretion of the LTC. Candidates may be asked to repeat some or all of the requirements. Questions concerning LTP progress and requirements should be directed to the LTC Administration Chair. Enrollees also should keep the Administration Chair informed of their mailing address, e-mail address, day and night telephone numbers, and name changes. Those who wish to progress from one leader category to another should make sure that their intention is understood by the Administration Chair and that their provisional leads satisfy the applicable requirements. If candidates have questions

about first aid, navigation, rock climbing, or snow climbing, they should address them to the respective Technical Chairs. Questions or suggestions of any nature pertaining to the LTP or the LTC may be addressed to the LTC Chair. Questions pertaining to Angeles Chapter safety policy, to the definition of trip categories, and to certification of leaders other than by LTP graduation should be addressed to the Angeles Chapter Safety Committee Chair.

MENTORS

All leader candidates are encouraged to have a mentor, an experienced leader who can help guide the candidate through the LTP process.

LEADERS' LIST SERVER

Angeles leaders are encouraged to sign up for the chapter's leaders' list server to receive occasional messages of interest to leaders. To sign up send an e-mail to LISTSERV@sierraglub.org. You may leave the subject line blank. For the message, write SUBSCRIBE ANGELES-OUTINGS-LEADERS yourfirstname yourlastname.

PROVISIONAL LEAD POINTERS

I. General Reminders

- A. The evaluating assistant leader shall not be someone with a close relationship with the provisional leader, i. e., a spouse, partner, or close relative.
- B. The evaluating leader shall have been a leader at the level of the outing for two or more years.
- C. For I-, M-, and E-level provisional outings, the outing should be solidly within that level, not at the lower end of it.

II. Scheduling Provisional Leads

In anticipation of fulfilling all requirements to advance to provisional leader status, candidates may schedule their provisional outing(s) prior to completing all the requirements. Because of the long lead time to get a write-up into the chapter *Schedule* or a little less for the *Southern Sierran* or group, section, or committee newsletter, such scheduling is quite acceptable. The sponsoring outings chair, nevertheless, must know that a candidate has a reasonable plan to complete the prerequisites prior to the outing date. The outings chair should actively monitor the candidate's progress prior to the trip.

A problem arises, however, when a candidate has not been able to meet all the requirements by the date of the provisional lead. In this case, a candidate has several options:

- A. The outing may be postponed until after the requirements are met. The candidate should have a firm date in mind to communicate to would-be participants of the originally scheduled outing.
- B. Another appropriately rated leader may take over for the candidate, and the candidate may schedule another outing. The leader candidate may not participate in any leader capacity on the original outing now to be led by current leaders of the appropriate rating.
- C. The outing may be canceled.

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- D. If the candidate has met all prerequisites but his or her CPR and first aid certifications are slightly out of date, the candidate may apply to the LTC Chair and Safety Chair for a waiver in order to lead the outing as originally scheduled. A candidate, however, who has never taken CPR or any level of first aid may not lead a provisional outing.

III. Meeting Navigation Requirements for I-, M-, and E-level Provisional Outings

If M- and E-level provisional leaders are already I-rated or M-rated, their provisional outings need not be planned with a view to demonstrating navigational skill. These provisional leaders will be expected to navigate well and show good route-finding skills, of course, but the outings do not have to be planned with significant navigation as one of the factors. M- or E-level provisional leaders who are not already I- or M-rated need to demonstrate navigational skill on two of their provisionals as would be expected of an I-level provisional leader. Passing the E-level navigation checkout is a sufficient demonstration of that skill level.

- A. I-level provisional outings (and M- and E-level for provisional leaders who are not already I- or M-rated) need to allow the provisional leader to demonstrate navigation and not only route-finding skills. Here are some clarifications and amplifications:
1. The route must involve cross-country travel, i.e., routes that are not on roads, maintained trails, or use trails and ducked routes that are known to be reliable. Occasional encounters with use trails or ducked routes will not prevent a route from being considered cross-country.
 2. The objective and/or significant portions of the route to it should not be visible from the point of departure from the trail, i.e., simply leaving the trail to take an obvious route to a nearby visible objective does not demonstrate navigation skill. A summit visible from the trail would be acceptable only if the route involved a navigational challenge (i.e., the summit is visible from the trail but not for most of the route).
 3. Cross-country routes should be significantly different from available trails. Simply staying off a trail while walking essentially the same route does not demonstrate navigation skill.
 4. The route will require the leader to make important decisions which require navigation skill and correct judgment such as traveling on a bearing in a forest or desert; choosing the appropriate gully, drainage, ridge, etc. to follow or cross while ascending and/or descending; etc. The following are unacceptable for demonstrating navigational skill:
 - a. Going up or down a long ridge that has no forks or where there is no choice between ridges
 - b. Going up or down a long gully that does not have major tributaries and changes in direction or where there is no choice between one or more gullies
 - c. Gentle, open, featureless, or low-relief terrain on the topo and to the eye that is simple and easy to follow.
 - d. Destinations in the Sierra Nevada or elsewhere where normal routes clearly do not involve sufficient navigation for a provisional lead, such as Mt. Agassiz, Cirque Peak, Mt. Goode, Mt. Lamarck, Mt. Tom, Vogelsang Peak.Generally acceptable demonstrations of navigational skill include
 - e. cross-country in broken terrain with visibility limited to nearby features because of the terrain (may include finding passes or gullies in the mountains and key up or down turnoffs to achieve a planned route)
 - f. cross-country navigation in a heavy forest with broken terrain
 - g. cross-country navigation in broken terrain on snow where there are no trail markers or pre-existing trail
 - h. cross-country to normally easy objectives using alternate routes of much greater navigation difficulty. Be sure it is a feasible, likely route, however, and not one contorted to demonstrate navigation.
 5. Off-trail navigation is “significant” when it provides a meaningful demonstration that the candidate can make practical use in a real trip situation of the types of skills that are tested in the exercises of the I/M navigation checkout. Neither the navigational problems nor the travel needs to be more difficult than the checkout. This is not a test of climbing skill or the ability to conduct arduous travel over rough terrain.
 6. The only navigation aids permitted for provisional leaders are map, compass, and altimeter. If the altimeter
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used is integral to a GPS receiver, the leader may not use the GPS “pages” on the instrument. A GPS may not be used to navigate or to mark waypoints to be followed later. The provisional leader may also not rely on the navigational advice or directions from others in the group.

7. Here are some suggestions:
 - a. Lead an outing to one of the many desert peaks that are not visible from the trail (if any) or cars.
 - b. Lead an outing to an HPS peak by a different route in which the peak is not visible from the point of departure from the trail. This should be a route without a known, clear use trail and with some sort of navigational challenge.
 - c. Lead an outing that requires navigation through forest
 - d. Lead an outing other than a peak climb that involves cross-country navigation, such as a cross-country trip through western Sierra forest to visit a lake or some other feature not visible from or easily deduced from the take-off point from the trail. There is no requirement that an I-level provisional outing include a peak climb, and candidates would be well-advised to consider interesting non-peak objectives that require significant off-trail navigation.
- B. The LTP checkout process previously certified the provisional leader’s basic navigation competence, whether I/M or E. The provisional leader simply needs to demonstrate appropriate use of the navigation skills during a real-life group-led situation, not on any contorted provisional navigation route.
- C. The LTP has always encouraged scouting the provisional trip (and other outings), which is a good strategy for experience and safety reasons. In scouting the provisional trip route, however, the provisional leader has then already navigated the route. This is entirely acceptable. In analogous provisional rock and snow situations (M and E), the provisional leader, having scouted, would simply perform all the technical moves correctly again. Same for navigation. The candidate is required to demonstrate the navigation skills and decision-making steps to the checkout leader regardless of having scouted the outing.
- D. The provisional leader is encouraged to consult with the assistant/evaluating leader, his or her leader mentor, and/or the outings chair of the sponsoring group, section, or committee in planning the provisional outing. The provisional leader may also wish to consult the LTC Navigation Chair and/or the LTC Chair about the acceptability of the proposed outing as a provisional lead.
- E. Finally, the assistant leader is responsible to determine the adequacy of the provisional leader’s performance, not only for navigation but all other aspects of the outing. The assistant leader may ask questions or take actions similar to those of a navigation examiner during an LTP checkout and may pose challenges or problems for the provisional leader to solve along the way.

IV. Meeting Route-finding Requirements for I, M, and E Provisional Outings

- A. Route finding is a different skill than navigation, but demonstrations of both are required for cross-country travel.
- B. Route finding involves the small-scale decisions of the leader in determining the route through terrain that is not obvious. This is a learned skill developed by experience on various types of terrain.
- C. On many peak climbs the “listed” routes follow a line of weakness up the peak with more difficult ground on either side. The listed route may be second class or I rated, but to either side it may be third class or full of dense brush. How well the leader does in discerning the route will keep the group on the easiest ground and within the rating classification of the outing.
- D. The assistant leader should evaluate the leader candidate on route-finding decisions and the leader’s awareness and handling of the group dynamics and abilities on the different types of terrain.
- E. A provisional leader may need to consider such route-finding options as
 1. Making a side-hill traverse vs. a descent and regain of altitude.
 2. Ascending or descending scree and/or talus.
 3. Traveling across large talus or small talus blocks.
 4. Going around a difficult patch of terrain or across it.
 5. Selecting stream-crossing points where no bridge is available.
 6. Choosing between travel on snow or on adjacent rocks.
 7. Going through the brush or over other terrain
 8. Deciding to go around fallen logs or over them.

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- F. Route finding may also require management of the group whenever there is a possibility of rock fall or loose terrain.
 - G. Such route-finding decisions not only indicate skills in reading terrain but also in estimating overall time required for a group, considering energy requirements for various options, and relating the time and energy aspects to the trip participants and the trip plan.
 - H. Screening of participants comes into play as well as the adequacy of the trip plan for the time required to negotiate the terrain.
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