

**SAFETY COMMITTEE**  
**Sierra Club - Angeles Chapter**

**ANGELES CHAPTER SAFETY POLICY – 27 April 2008**

**I. SAFETY RESPONSIBILITIES OF GROUPS, SECTIONS, AND COMMITTEES**

Outings are carried out in nearly all cases under the sponsorship of a group, section, or committee (“entity”) which is responsible for overall planning, selection of leaders and scheduling. No other element of the chapter has the same timely and specific knowledge and opportunity to ensure safety. Thus the basic responsibility for outing safety rests with the sponsoring group, section, or committee. This includes

**A. Formulation and communication of basic procedures for leader and participant selection and conduct:**

1. **Establishment of procedures:** This policy provides minimal procedures for O-level outings. To sponsor any outings above the O level, a group, section, and committee shall prepare a set of essential rules and procedures (the entity’s safety policy) for safe conduct of outings which will supplement the chapter Safety Policy. These shall express the obligations of outing leaders and participants and assist the leader in keeping participants together and maintaining control of the group. A copy of these procedures shall be filed with the Safety Committee, which shall review and approve them. Each entity should undertake periodic review of its safety policy and recommend any revisions to the chapter Safety Committee for review and approval; such a process is mandatory if any major changes occur such as in the level and nature of outings conducted or granting of “quick-turnaround” outings approval authority (Para. IX).
2. **Sign-in sheets and waiver forms:** Sign-in/Waiver forms shall be used as required by national Sierra Club policy as a minimum.
3. **Rules of Conduct:** Every leader and participant shall be informed of the rules that govern conduct on an outing. Sponsoring entities may elaborate upon the chapter's Rules of Conduct in their outings policies to match their outing characteristics.
4. **Special or technical requirements:** Any group, section, or committee that conducts outings that involve special difficulty (e.g., skiing, scuba diving or sailing trips) or in which special skills or equipment are essential to safety shall establish procedures for the selection of appropriately trained and qualified leaders and participants. These procedures shall be approved by the chapter Safety Committee.

**B. Selection of leaders:** Outings leaders shall possess adequate knowledge, skills, and experience as required by the outing. The leaders shall have an Angeles Chapter leadership rating appropriate to the proposed trip. A minimum of two leaders is required for all outings (except as noted below). Where group size or outing circumstances may require additional leaders for control and group management, the outings chair shall assure that an appropriate number of additional leaders are provided. As a minimum, the leaders must

1. Be certified by the chapter Safety Committee. Those not listed in the Angeles Chapter on-line Leader List with an indication of the following items must obtain special approval from the Safety Committee Chair. Certification requirements include
  - a. A leader rating appropriate for the planned outing,
  - b. Sierra Club membership current at the time of an outing,
  - c. [Effective 7/1/08] First aid certification received not more than four years before conduct of an outing,
  - d. [Effective 7/1/08] A record of having completed/refreshed OLT 101 and having read the Chapter Supplement to OLT 101 (or equivalent) to update their knowledge of club and chapter policies not more than four years before conduct of an outing;
2. Know the basic procedures for conduct of the outing;
3. Be capable of effective control of the group during the outing;

4. Know Sierra Club emergency procedures and be in sufficient physical condition to handle emergency situations;
  5. Know the areas to be entered and the conditions to be encountered during the outing.
- C. Selection of the outings chair:** The outings chair of the group, section, or committee plays a crucial role in planning, selection, and scheduling of outings. More than any other individual, he/she can influence outing safety. Therefore, it is important that he/she be selected with great care. He/She should be a well-qualified outings leader familiar with the types and locations of outings frequently conducted by the group, section or committee. Any outings chair who is not an Angeles Chapter certified leader is subject to Safety Committee guidance and review. Entities shall notify the OMC Chair, the Safety Chair, and the *Schedule of Activities* (*Schedule*) editor of any new outings chair appointment before the new outings chair functions to approve outings for the entity. In the event an entity's outings chair is temporarily unavailable due to travel or another cause the entity's chair shall appoint a fully-qualified acting outings chair and report his or her identity to the Chapter Safety Chair.

The Chapter Outings Chairs listserv (ANGELES-OUTINGS-CHAIRS@LISTS.SIERRACLUB.ORG) shall be used to keep outings chairs informed on matters of safety and on changes to club and chapter outings policies. Outings chairs without e-mail are to provide the OMC and Safety Chairs with an e-mail address of someone who will forward listserv messages to the outings chair.

- D. Publication of essential information in the chapter *Schedule*, newsletters and web sites:**
1. Every outing shall have a leader and at least one properly qualified assistant listed.
  2. The demands on participants with respect to the difficulty of an outing (such as elevation gain, distance, pace, etc.) and special skill requirements shall also be published. Each outing shall contain an indication of its rating (O/I/M/E) (as defined under Leadership Qualifications). Each chapter *Schedule* shall contain a definition of these levels of leader/outing certification.
  3. Outings write-ups for the *Schedule* and for all entity newsletters shall be submitted through the outings chair of the sponsoring group, section, or committee, to assure compliance with applicable safety policies. Every outing must be sponsored by a chapter entity, and by so sponsoring any outing, the group, section, or committee is giving its approval to the outing plan and the outing's leadership. Publication is required for all outings to indicate that the sponsoring entity has approved the outing as an official Sierra Club outing.
  4. Outings with multiple sponsors listed must be approved in advance by each sponsoring entity and must comply with the outings procedures of each entity. The primary sponsor must be listed first in the header wherever the write-up is published. The primary sponsor is the one that would take the lead to investigate, in conjunction with the Safety Committee, any incidents that occurred on the outing.
- E. Outing leader requirements:**
1. With the exception of "conducted" events, two appropriately-rated leaders are required for all outings.
  2. If two rated leaders are not available at the start of the outing, the outing must be canceled. Trips canceled for this reason may not be led as "private" outings.
  3. Certain repetitive local conditioning hikes that split into subgroups at the starting point may be sanctioned by the Safety Committee to operate with one leader per sub-group provided that the sponsoring entity has established alternate means for group control and safety.
- F. Accidents and complaints:**
1. Investigate all accidents and complaints with action taken as appropriate. All accidents and incidents are to be reported as required by national and chapter policy. The Safety

Committee is to be notified of all such events and will participate in their resolution at its discretion.

**G. Archiving requirements:**

1. All trip write-ups and original sign-in/waiver sheets must be archived for seven years after completion of the outing.
2. In the event a trip is published only electronically (at a web site or any other non-print medium) a printed (“hard”) copy of the write-up must be archived for the seven-year period.

**II. RESPONSIBILITIES OF LEADERS:**

The outing leaders shall exercise control during the outing and are responsible for its safe conduct. This includes

**A. Compliance with the requirements and procedures established for safe outing conduct:**

1. The leaders shall keep the group together and under control at all times.
2. All participants shall be signed in at the place of origin of the outing or at any other suitable place determined by the leaders. Participants must be made aware of the need to sign a liability waiver and how to obtain a copy. Participants should be provided an opportunity to back out of the outing if they decide not to sign the waiver. On most one-day outings, participants should sign the liability waiver at the initial trip meeting place. If there is a carpool to the trailhead, participants should sign the waiver before the carpool. IMPORTANT: The carpool to the trailhead is NEVER part of the Sierra Club outing, and leaders should not suggest or imply that the outing begins with the carpool.
3. The leaders shall check that all participants are properly equipped and qualified for the outing, either through pre-screening, at the trailhead, or both.
4. Any participant leaving the outing before its completion must be signed out, consistent with national policy (“Early Sign-Outs”). The leaders must account for the whereabouts of all participants at the end of the outing.

**B. Adaptation to the conditions that prevail during the outing:**

1. The leaders shall modify the outing plan as necessary to avoid exceeding the capability of the group.
2. The leaders shall abort the outing objective if circumstances prevent its completion in safety.
3. During the conduct of an outing, if two rated leaders are not available for any part of the planned outing, a fully-rated leader may appoint an experienced participant to assist in conduct of that part of the outing. Such a participant must be a Sierra Club member. Before doing so, the leader must make the determination that the outing plan may be safely completed with the remaining group. Following any outing during which this occurs, the leader shall report the circumstances by submitting an incident report to the outings chair and to the Safety Committee Chair.

**III. RESPONSIBILITIES OF THE CHAPTER SAFETY COMMITTEE:**

**A. Responsibilities of the Safety Committee:**

1. Review and approve outings procedures: Review and approve procedures established by the groups, sections, and committees for the safe conduct of all outings. Procedures judged inadequate by the Safety Committee shall be returned to the appropriate groups, sections, and committees for revisions.
2. Review outings Schedules and publications: Monitor the chapter outings *Schedule* and other publications to ensure that qualifications of leaders are appropriate to the requirements of the outings and that outings difficulties are properly identified for participants.

- a. The Safety Committee shall communicate with the sponsoring group, section, or committee and request modifications of outings that involve requirements that exceed the qualifications of the leaders or participants.
- b. If the above is not successful, the Safety Committee shall direct the sponsoring group, section or committee to cancel the outing.
3. Accidents and complaints: Investigate outing accidents and complaints involving outings leaders. Depending on circumstances and steps taken by the sponsoring group, section or committee, additional action may be taken by the Safety Committee.
4. Provide outings-related policies and forms: Monitor national outings policies and forms for changes; notify chapter entities of updates to policies and forms applicable to chapter outings through publication of a chapter Safety Report.
5. Keep files of accident reports. Assure the accident reports are filed and that copies are maintained in chapter files.
6. Certify new outings leaders upon their completion of the leadership training program, or alternate methods to the satisfaction of the Safety Committee; notify sponsors of provisionally led outings; provide information to update the chapter on-line Leader List.
7. Monitor the chapter Leader List and help resolve any problems which may develop.
8. Authority as delegated to supervise safety and risk management of the chapter's outings program.

**B. Composition of the Safety Committee:**

1. The Safety Chair. The Chair of the Safety Committee shall be appointed by the chapter Executive Committee.
2. Other members of the Safety Committee. The Safety Committee shall include the Outings Management Committee (OMC) Chair, the Leadership Training Committee (LTC) Chair, the Wilderness Training Committee (WTC) Safety Coordinator, the OMC elected safety representative (or alternate) and other members appointed by the Safety Committee Chair as desired to enhance judgment, expertise and liaison functions.

**IV. LEADERSHIP QUALIFICATIONS:**

**A. Angeles Chapter leadership ratings:**

Leadership qualification is an essential factor in outing safety, and a system of certification of leader qualifications has been established. For this purpose, different levels of leadership ratings and requirements shall be recognized.

Level C: (Conducted)	Certain outings are conducted almost entirely under external control, such as a concessionaire or ranger. In these cases, the Sierra Club leader has little responsibility beyond administrative matters. Such outings require only minimal leader qualifications and need not be included in the certification system.
Level O: (Ordinary)	Outings at this level are trips on trails or off trail with no navigation nor terrain difficulty (Class 1). These outings require minimal technical skills of outings leaders and participants. Prior backpacking experience is a leader requirement for outings that involve backpacking. New leaders who have not led a backpack as a provisional leader are identified as O-1 (O Level 1) leaders who may lead day hikes and car camps but not backpacks. Such O-1 leaders may subsequently upgrade to O-2 (O Level 2) status by completing a provisional lead of a backpack.
Level I: (Intermediate)	This level shall be used when outings include cross-country travel. Leader qualifications shall include demonstrated navigation and backpacking capability in addition to the O-level requirements.
Level M: (Moderate)	Outings that involve Class 3 rock or snow travel requiring the use of an ice axe shall be classed as M. Technical training in rock

	climbing and snow travel are required in addition to lower level (I and O) requirements.
Level M-rock:	Outings that involve Class 3 rock but not Class 3 snow travel. Technical training in rock climbing is required in addition to lower level (I and O) requirements. This is the rock element of the Level M category above.
Level M-snow:	Outings that involve Class 3 snow travel requiring use of an ice axe but not Class 3 rock travel. Technical training in snow travel are required in addition to lower level (I and O) requirements. This is the snow element of the Level M category above.
Level E: (Exposed)	Outings that involve Class 4 rock or snow travel that requires the use of crampons in addition to ice axe for safety shall be classed E. Leaders are required to demonstrate more advanced skills involving rock climbing and snow travel than are required for level M.
Level T: (Technical)	A relatively few outings involve unusually specialized technical difficulty (for example, sailing, scuba diving or ski mountaineering). These outings impose unusual and highly specialized leadership requirements, and certification of leadership qualifications shall be in accordance with the requirements of the entities that sponsor such outings.

**B. Outing ratings adjustment to conditions:**

If it is probable that circumstances will arise that impose much greater difficulty (e.g., outings held in early spring), then the outing shall be considered one level higher (a level I outing shall become a level M outing, etc.) and shall be led only by persons qualified for the higher level. Technical outings (level T) already encompass a broad span of difficulties and leadership selection shall take account of possibly adverse conditions. Consequently no level in excess of level T shall be required.

**C. Training and certification:**

Chapter-approved leadership training course requirements shall be structured to be compatible with the leader requirements for Levels O through E.

Certification of leadership qualifications shall be done by the Safety Committee. Experience and training other than that obtained through these programs shall also be recognized as a basis for leadership certification, provided these satisfy standards established by the Angeles Chapter and the Sierra Club.

The OMC maintains an on-line database of certified and provisional leaders for outings chair use. This list provides the following information: name, membership number and expiration date, leader certification level, first aid certification (date of course completion and type of course--standard or wilderness first aid), and date of policy knowledge renewal. Any questions concerning certification can be appealed to the Safety Committee for resolution.

**V. PARTICIPANT QUALIFICATION:**

Groups, sections, and committees are responsible for screening participant qualifications according to procedures established for outing conduct. They also shall provide training as appropriate to outing requirements. Currently the WTC is responsible for general basic participant education and training and, thus, can serve as an additional basis for qualification. Groups, sections, and committees shall cooperate in training activities.

**VI. SCOUTING OF OUTINGS:**

Requirements for scouting depend strongly on the nature of the outing and the capabilities of leaders and participants. Specific scouting requirements are left to the discretion of the groups, sections, and committees.

**VII. TRANSPORTATION:**

Safety aspects of travel (automobile, etc) connected with outings are not considered here. With some exceptions, Sierra Club policy is to accept no responsibility for travel to, during, or from outings, leaving that to private, voluntary arrangements. Some chapter organizations make special travel arrangements, but these are largely specific to their activities, and safety aspects are best addressed by the particular organizations concerned in establishing their outing procedures.

**VIII. NEWSLETTERS:**

A complimentary copy of all group-, section-, or committee-sponsored publications is required to be sent to the Safety Chair, the Outings Checker and the Angeles Chapter office.

**IX. QUICK-TURNAROUND OUTINGS APPROVAL**

Quick-turnaround outings approval is a process whereby an entity outings chair is authorized to publish, in print or electronically, and then allow the conduct of an outing without Safety Committee approval of those outings. The chapter Safety Chair may grant authority for quick-turnaround approval of outings to selected entity outings chairs if they formally request such authority. Criteria include

- Outings chair attendance at Angeles Chapter Outings Chair Training (unless waived by the Safety Chair)
- Outings chair experience and past performance
- The character of the outings sponsored by the entity.

Quick-turnaround approval may be limited to Level O-1/O-2/I etc. at the discretion of the Safety Chair after consulting with Safety Committee members. Quick-turnaround approval authority is assigned to a specific individual outings chair for the specified entity and terminates when that individual ceases to be the entity's outings chair (i.e., is not transferable to the new outings chair). This authority is a privilege and may be revoked at the discretion of the Safety Chair.

Entities which have been granted quick-turnaround approval authorization shall be also be granted authorization for web-only publication of the relevant outings by the Safety Chair if they provide an accepted documented plan for archiving the electronically published outings consistent with the requirements of Section I.G.2; this plan may be provided as a stand-alone document emailed to the Safety Chair. This does not relieve the entities from updating their Safety Policy to reflect these changes (quick-turnaround approval and web-only publishing) and to correct other deficiencies with all deliberate speed.

Outings write-ups approved by outings chairs under this quick-turnaround provision shall be provided to the Safety Committee for information as soon as possible (e.g., by parallel email if they are submitted for publication at a web site).

**X. FUTURE CHANGES:**

This policy is subject to changes reflecting new situations or accommodating chapter experience in operating under it. The Safety Committee shall review the policy from time to time, but no less frequently than annually, and the Safety Chair shall propose revisions to Outings Management Committee (OMC) if revisions are deemed required. If the proposed revision is adopted by a vote of the OMC, it will become effective upon its confirmation by a vote of the chapter's Executive Committee.