

Sierra Club – Angeles Chapter Safety Committee

2005/2006/2007/2008 Safety Report

(Statistics for 2004-2007)

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Enclosure 1 (to paper copies): Accident Reports and Incident Reports

1. SAFETY PROCEDURES

Groups, Sections and Committees (GSCs) are authorized to conduct O level outings under the Chapter Safety Policy. Any GSC leading outings above the O level or outings of a specialized nature (other than hiking) must have an approved safety policy on file with the Chapter Safety Committee. The following organizations have submitted safety procedures that have been approved by the Safety Committee for the level indicated.

A number of these policies have not been changed in years. These policies may be revised and updated with the approval of the Safety Committee. They should be reviewed to ensure that they cover the types of activities currently conducted by the GSC; coverage for activities no longer conducted by the GSC should be deleted from the policies. Some policies may require a change to be compatible with the national Leader Standards Policy.

Approved Safety Policies and Procedures

	Groups	Sections	Committees
I-Level			K-9 Lower Peaks
M-Level *	Airport Marina Antelope Valley Crescenta Valley East San Gabriel Valley Long Beach Mt. Baldy Pasadena Palos Verdes-South Bay Rio Hondo San Fernando Valley Verdugo Hills West Los Angeles	20s & 30s Gay and Lesbian Sierrans Hundred Peaks International Community Nordic Ski Touring Orange County Sierra Singles Sierra Singles Wilderness Adventures	Backpacking Bicycle Touring Camera History Santa Monica Mtns TF
E-Level		Desert Peaks Sierra Peaks Ski Mountaineers	Leadership Training Wilderness Training

*Orange County Group policy rescinded and deleted from list per OC request.

T Level (Technical) with type of specialized outings listed.

SCUBA Diving, Sailing	Airport-Marina Group	Sierra Singles	20s & 30s
Sailing	Orange County Sierra Singles		
Water Travel	River Touring Section		
Alpine Skiing	Alpine Ski Mountaineers	Ski Mountaineers	

2. LEADER CERTIFICATIONS

The Chapter's Leadership Training Program (LTP) and leader rating system started in 1971. In 1973, existing leaders were grandfathered into an O, M, or E rating, based on recommendation of the various entities. Some, but not all, of these grandfathered leaders later went through LTP. In 1975, RCS (**Rock Climbing Section**) and SMS leaders who had previously been designated with a technical (T)-designation were brought into the rating system and granted either an O, M, or E rating, based on recommendation of these sections. The mid-1970s also saw a number of adjustments to ratings that had been granted. In 1978, the I rating was added to the system. The O-1 (O Level 1) rating was started mid-year 2004.

The following table indicates the approximate numbers of leader certifications each year for each of the leader ratings. Some years may include only LTP graduates; other years include all certifications. A further effort to eliminate discrepancies will be made during 2008.

YR	NEW LEADERS					UPGRADES				NEW + UPGRADE TOTALS					TOTAL				
	O-1	O	I	M	E	O	I	M	E	O-1	O	I	M	E	NEW	UPG	TOTAL		
1971	#		#	15	17				3	#	0	#	15	20	32	3	35		
1972	#		#	36						#	0	#	36	0	36	0	36		
1973	#	417	#	297	99			4	20	#	417	#	301	119	813	24	837		
1974	#	144	#	27	3			7	8	#	144	#	34	11	174	15	189		
1975	#	38	#	26	22			2	4	#	38	#	28	26	86	6	92		
1976	#	40	#	12				5	7	#	40	#	17	7	52	12	64		
1977	#	0	#	0						#	0	#	0	0	0	0	0		
1978	#	90		42	4			2	4	10	#	90	2	46	14	136	16	152	
1979	#	34	3	18				1		2	#	34	4	18	2	55	3	58	
1980	#	130	3	20				12	4		#	130	15	24	0	153	16	169	
1981	#	75	3	13				14	5		#	75	17	18	0	91	19	110	
1982	#	112	6	21				6	7	2	#	112	12	28	2	139	15	154	
1983	#	98	4	18	1			7	5	8	#	98	11	23	9	121	20	141	
1984	#	92	3	13				15	3	3	#	92	18	16	3	108	21	129	
1985	#	101	4	24	2			4	3	1	#	101	8	27	3	131	8	139	
1986	#	79	2	14				8	2		#	79	10	16	0	95	10	105	
1987	#	94	8	10				4	3	2	#	94	12	13	2	112	9	121	
1988	#	90	3	6				9	6	1	#	90	12	12	1	99	16	115	
1989	#	103	0	7				4		1	#	103	4	7	1	110	5	115	
1990	#	94	5	1				3			#	94	8	1	0	100	3	103	
1991	#	102	2	1				10	3		#	102	12	4	0	105	13	118	
1992	#	75	2	8				7	3		#	75	9	11	0	85	10	95	
1993	#	74	5	6				10	3		#	74	15	9	0	85	13	98	
1994	#	97	6	4				11	4	1	#	97	17	8	1	107	16	123	
1995	#	68	7	3				8	3		#	68	15	6	0	78	11	89	
1996	#	45	6	4				6	4		#	45	12	8	0	55	10	65	
1997	#	56	11	2				4	2	1	#	56	15	4	1	69	7	76	
1998	#	53	7	1	1			7			#	53	14	1	1	62	7	69	
1999	#	63	7	0				4	2		#	63	11	2	0	70	6	76	
2000	#	50	4	1				6	2		#	50	10	3	0	55	8	63	
2001	#	66	3	0				6	1		#	66	9	1	0	69	7	76	
2002	#	72	7	4	1			7	2		#	72	14	6	1	84	9	93	
2003	#	69	10	1				8	2	1	#	69	18	3	1	80	11	91	
2004	19	27	2	0				5			19	27	7	0	0	48	5	53	
2005	47	14	11	1				11	2		47	14	22	3	0	73	13	86	
2006	56	9	11	1				3			56	9	14	1	0	77	3	80	
2007	48	2	11	3				1	2	1	48	3	13	3	1	64	4	68	
Sub-total	170	2773	156	660	150			1	204	93	76	170	2774	360	753	226	3909	374	4283
Yr?*		109	2	2	1								109	2	2	1	114	0	114
Total	170	2882	158	662	151			1	204	93	76	170	2883	362	755	227	4023	374	4397

* The Yr?* line just above the totals indicates leaders whose year of certification is currently unknown. Additional research is needed. In some cases, the uncertainty is due to name changes for which there is no record. Further research will likely decrease numbers on this line (and the total line). The total number of leaders certified to date should be somewhere between the Subtotal and Total numbers.

The 1960s thru 1980s was our golden age of **mountaineering**. A Basic Mountaineering Training Course (BMTC) for participants (first started in 1961 **by members of the climbing sections**) topped 1000 students a year for a number of years. From 1978 to 1988, the sponsoring Mountaineering Training Committee along with the climbing sections produced a significant number of mountaineering leaders. Total leader certifications were over 100 for a dozen years in a row.

Insurance restrictions, first imposed in 1986, quickly put the brakes on this activity. In 1986, climbs were limited to 3rd class before restrictions were lifted a year later. In late 1988, more drastic restrictions prohibited use of ropes and ice axes. BMTC was re-structured into a Wilderness Travel Course (WTC). Many leaders retired. In the 20 years since then, there have been only ten new E leaders. M-level certifications were cut in half, and then cut again when the further restrictions were imposed in 1988. There was a bulge in production of new M-leaders in the early 1990s as the new Wilderness Training Committee emphasized leader training for a half-dozen years. Without this emphasis in more recent years, leader production has dwindled to an average of only a couple of new M-leaders each year.

The O-level certifications also saw a considerable drop in 1995 but were then steady until the O-1 (O Level 1) certifications started mid-2004. Since then, most of the new leader certifications have been O-1 with a declining number of O Level 2 certifications. There was a significant decline in the number of new leaders in 2004. Confusion about pending changes in national leader requirements may have contributed to delays in pursuing the leadership requirements by LTC candidates. The table below indicates that efforts of entities such as HPS, OCSS, 20s-30s, and WTC may have helped increase the totals during 2005-2007.

3. PROVISIONAL LEADS

The table below shows the Groups, Sections and Committee where new leaders conducted their provisional outings. Due to multiple trips by some leaders, and joint sponsorship of outings, the total numbers will not correlate to the total number of new leaders. However, this list does indicate activities in entities leading to the generation of new leaders. Weaknesses and strengths in leader development activities may be inferred from this data to help focus attention to where additional encouragement or mentoring could help produce more new leaders. Numbers (separated by slashes) indicate the quantity of sponsored provisional outings in 2004/2005/2006/2007.

Regional Groups		Sections and Committees	
2004/05/06/07		2004/05/06/07	
Airport Marina	0	Alpine Ski Mtn	0
Antelope Valley	1/0/0/0	Backpack	0
Central	0	Bicycle	1/0/0/1
Crescenta Valley	0/0/0/2	Camera	0/1/0/0
E. SGV	0	DPS	0/3/2/2
Long Beach	2/7/0/4	Easy Hikers	0
Mt. Baldy	0/1/1/0	GLS	4/7/4/4
Orange County	1/1/2/0	Griffith Park	0/6/2/1
Sierra Sage	1/1/2/3	HPS	7/16/7/11
PVSB	5/1/2/2	ICO	1/1/2/5
Pasadena	0/0/4/1	ROAD	0
Rio Hondo	0	OC ICO	0/0/3/1
San Fernando	1/1/2/1	Int. Com.	1/0/0/0
Santa Clarita	2/0/0/0	K-9	0
Verdugo Hills	1/2/1/0	Local Hikes	0/0/1/1
West LA	0/0/1/0	Lower Peaks	0/2/0/1
		Mtn Bike	1/1/1/0
		Mule Pack	0
		Nat. Science	2/2/0/1
		Nordic Ski	0
		OCSS	6/10/9/12
		River Touring	1/0/0/0
		SPS	1/5/2/8
		Sierra Singles	0/3/5/0
		Student	0
		Ski Mtn.	1/2/1/0
		SMMTF	4/1/2/1
		SSMTF	0
		Trails	0
		20's-30's	8/13/23/12
		Wild Adv.	2/2/3/3
		WTC	5/17/15/15

4. ACCIDENT SUMMARY COMPARISON

	'79	'80	'81	'82	'83	'84	'85	'86	'87	'88	'89	'90	'91	'92	'93
Rock	3	5	5	7	12	7	1	4	12	6	6	1	3	0	4
Snow	9	5	15	9	17	17	14	10	4	4	2	5	0	2	3
Other	3	4	11	9	22	16	26	17	12	18	24	14	17	18	13
Total	15	14	31	25	51	40	41	31	28	28	32	20	20	20	20

	'94	'95	'96	'97	'98	'99	'00	'01	'02	'03	'04	'05	'06	'07	
Rock	3	2	0	0	0	1	2	3	1	1	1	1	1	0	
Snow	3	1	0	0	1	1	4	4	2	0	1	1	1	0	
Other	19	9	13	16	7	18	18	21	11	16	6	6	8	6	
Total	25	12	13	16	8	20	24	28	14	17	8	8	10	6	
Incidents						4	4	2	5	2	2	3	5	5	

“Rock” includes 3rd class scrambling and above; “Snow” includes snow climbs, glissading, and skiing; “Other” includes tripping and sprains on non-technical terrain, heat, medical conditions, etc. “Incidents” includes lost hikers, illness, and non-injury events that disrupt an outing, etc. These are not included in the total line.

Note that the number of reported accidents significantly declined starting in 2002 from the prior 3 years when the reporting of all accidents was heavily stressed. Outings Chairs should check that all reportable accidents and incidents are reported promptly and to all the correct individuals as directed on the Chapter version of the instruction sheet. The National Office takes a dim view of late reporting or of first hearing about incidents from other sources. Refer to Incident reporting in the Information for Outings Leader section.

Contact the Safety Committee Chair for a list of accidents and incidents. A copy has been attached - as Enclosure 1 - at the end of paper copies of this report.

7. GENERAL COMMENTS

As a reminder, the Chapter Safety Policy requires that the Safety Committee receive copies of all Chapter publications that contain outings information. Please be sure that your newsletter editor sends out these copies on a permanent basis. Paper copies of newsletters should be sent to Barbara Reber and Erik Siering. Alternately, electronic copies may be sent to Charlie Knapke and Erik Siering. These later two also review writeups in the Chapter Schedule. While the Safety Committee may approve some entities to perform the pre-outing safety review, the Safety Committee still has the responsibility of oversight of the entire Chapter outings program and needs copies of the publications.

The latest copies of the Sign-In Sheet and Liability Waiver, Medical Treatment Authorization and Consent Form (for minors), Incident Report Form, and Emergency Response - Patient Report are included with this report. Also included for the first time is the (national) Safety Management/Emergency Response Plan. Entities are encouraged to assemble data for the areas they commonly hike in to assist leaders in completing this form. Outings chairs should encourage their leaders to use the form, especially for the longer trips.

Be sure to remind all leaders that any participants under the age of 18 who are not accompanied by a parent or guardian must have written permission* and a completed Medical Treatment Authorization and Consent Form.

Refer to the Information for Outings Leaders section for changes in leader requirement which become effective on 7/1/08.

Joe Wankum, 2005-2007 Chair, Angeles Chapter Safety Committee.

Please pass on this report to your successors when your term as outings chair is up so that continuity can be maintained.

* Use the Individual Liability Release Form (for unaccompanied minors), available on the LTC web site.

SAFETY COMMITTEE
Sierra Club - Angeles Chapter

ANGELES CHAPTER SAFETY POLICY

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 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:** Each Group, Section, and Committee shall prepare a set of essential rules and procedures 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.
 2. **Sign-In Sheets and Waiver Forms:** The procedures shall include a requirement that a sign-in sheet be used to sign each participant in and out and to record persons to be contacted in the event of an emergency. Exceptions to the use of sign in sheets must be specifically approved by the Safety Committee. The use of waiver forms shall follow National Sierra Club policy.
 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 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. Ideally, the leaders will have a Chapter leadership rating appropriate to the proposed trip. A minimum of 2 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 outing's chair shall assure that the appropriate number of additional leaders are provided. As a minimum, the leaders must be certified by the Chapter Safety Committee, and:
1. Be a current member of the Sierra Club;
 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. Special efforts should be made to keep him/her well informed on matters of safety. The Safety Committee will notify the outing's chair when new leaders are certified within that entity.
- D. Publication of essential information in the Chapter Schedule and/or newsletters:**
1. Every outing shall have a leader and at least one properly qualified assistant listed.
 2. The requirements of participants with respect to the strenuousness of an outing (such as elevation gain, distance, etc) and special skill requirement shall also be published. Each outing shall contain

an indication of its difficulty level (as defined under Leadership Qualifications). Each Chapter Schedule shall contain a definition of these levels.

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. Outings submitted by anyone other than the Outings Chair must be approved by the Outings Chair prior to publication. Every outing must be sponsored, 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 evidence 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.

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.
3. Trips canceled for this reason may not be led as "private" outings.
4. 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.

II. RESPONSIBILITIES OF LEADERS:

The outing leaders will 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 and signed out, whether at the place of origin of the outing or at any other suitable place determined by the leaders. IMPORTANT: The carpool to the trailhead is NEVER part of the Sierra Club outing, and leaders should be sure that their sign in/out procedures do 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.

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.

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 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 Accident Report Forms: Distribute the accident report form for use on Chapter outings.
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 course, or alternate methods to the satisfaction of the Safety Committee.
7. Publication of the List of Qualified Outings Leaders: At least annually provide to outings chairs a list of currently qualified outing leaders.
8. Authority as delegated to supervise safety and risk management of the Chapter's outings program. (rev. 03, ExComm, OMC resolution)

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 Chair, the Leadership Training Committee Chair, the Wilderness Training Committee Safety Chair, the OMC elected safety representative (rev. 03, ExComm, OMC resolution), and other members appointed by the Safety Committee Chair as desired to enhance judgment, expertise and liaison functions.

IV. LEADERSHIP QUALIFICATIONS:

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 difficulties and leadership requirements shall be recognized.

Level C: (Conducted)	Certain outings are conducted almost entirely under external control, such as a concessionaire, ranger, etc. 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 will be trips on trails or equivalent. These outings require minimal technical skills of outings leaders and participants. Prior backpacking experience is a leader requirement for outings that involve backpacking.
Level I: (Intermediate)	This level will be used when outings include cross-country travel. Leader qualifications will include navigation and backpacking training 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 requirements.
Level E: (Exposed)	Outings that involve Class 4 rock or snow travel that require the use of crampons for safety will 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, technical rock climbing, 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 Sections that sponsor such outings.

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.

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 handled through 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 Safety Committee and the Sierra Club.

A list of currently approved leaders according to the outing categories described above shall be maintained by the Safety Committee and circulated to the Outings Chairs for planning purposes. Any unresolved questions concerning certification can be appealed to the Safety Committee for settlement.

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. It is emphasized that more attention to developing and screening participant qualifications is needed.

VI. SCOUTING OF OUTINGS:

Currently scouting of outings is handled in a variety of ways, ranging from little or none, such as inspection of the roadhead, to completion of the outing by the scheduled route shortly before the scheduled date. The requirements for scouting depend strongly on the nature of the outing and the capabilities of leaders and participants. Thus scouting requirements can be left to the discretion of the Groups, Sections, and Committees, to be covered in their outing procedures.

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 are required to be sent to the Safety Chair, the Outings Checker and the Angeles Chapter office.

IX. 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 shall propose revisions to the Executive Committee. Suggestions for changes shall be directed to the Chairman

Helpful Hints for Outings Chairs

GLOSSARY

See [Information for Outings Leaders](#) (pg 17) for additional terms.

COL	Certified Outings Leader
MC	Management Committee
OC	Outings Chair
OCT	Outings Chair Training
WILD *	Web Interactive Leader Directory

* indicates National rather than Chapter term

ANGELES CHAPTER SUPPLEMENT TO OLT 101 Information for Outings Leaders

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- Newsletter Publication of Outings

II. Additional Duties of the Outings Chair

- Before the Trip
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- Recruitment – Members
- Recruitment – Leaders

III. Guidelines for Special Types of Outings

- Provisional Leads:
- Technical Outings
- Restricted Outings
 - International Outings
 - Watercraft and Rafting trips
 - Restricted Mountaineering Outings and
 - Mountaineering Training Outings

IV. Additional Outings Chair Resources

V. Attachments

I. Outings Chair Responsibilities

Thanks for being the Outings Chair for your Club entity; i.e., Group, Section or Committee (GSC). The Angeles Chapter of the Sierra Club leads the world in the number and variety of outings we offer our members. This doesn't just happen. You make it happen. You're the key player in the process of providing quality trips. The Outings Management Committee and the Safety Committee have put together these guidelines to help you in this task, and to help you insure that your GSC will have its trips approved and conducted without any safety problems.

As Outings Chair, you need to be familiar with Club, Chapter and your GSC policies and guidelines. You should also know where to find additional information as the need arises. There is a list of references on page 16. If you have not visited the referent web sites recently, you should do so to become familiar with the various requirements. [The list provides a URL link to most of the Club outings related Policies and Guidelines.](#) [The right column provides](#)

[additional information through FAQs; i.e., frequently asked questions and answers.](#) There are additional links under Online Resources at the end of the OLT 101 text (near top of left column).

As Outings Chair you have three major responsibilities:

1. **Solicit** your outings leaders to submit trips.
2. **Screen** all submittals for safety/appropriateness.
3. **Submit** the trips for publication in the Chapter Schedule and in your GSC Newsletter.

Let's look a little more closely at each of these.

1. Solicit

You want to handily make the deadline for submission to the Chapter's Schedule of Activities, which is published three times a year for a four-month period. Understand that this means contacting your leaders to plan outings that will run 5 - 8 months in the future. Here's how the timing works:

Schedule Period	Schedule Deadline Usually the 10th of	Start Soliciting
Nov. 1 – Feb. 28	July	May – Jun.
Mar. 1 – July 4	November	Sept. – Oct.
July 5 – Oct. 31	March	Jan. - Feb.

Be sure to check the Schedule for the exact deadline date. It is usually the 10th of the month. It is a good idea to advertise for trip submissions in your GSC Newsletter. Most Outings Chairs, however, will be much more proactive; they will also send a user-friendly message to all their outings leaders.

In the letter, be sure to specify the Schedule period you're working on and the deadline for submissions to you. It's helpful to provide a calendar showing all the weeks or weekends for the period. Give an example of the proper format. It may help to enclose a listing of all the other leaders in your GSC. Make clear that you will help facilitate the connection between trip leaders and assistant leaders.

Many GSCs also host a special meeting/party to plan the upcoming Schedule. This helps in making the leader connections, and it also helps in trying to spread your trips more or less evenly throughout the period, if possible. And it's also fun! Be prepared to suggest specific outings, especially some less-commonly led ones. Consider public service trips; e.g., trail maintenance or events advertised as fundraisers for your GSC or the Chapter.

The real difficulty here is in getting people to think so far ahead. While most of our leaders are used to this, it is still difficult to get the leaders to submit write-ups by your deadline. You need to set this date early enough to allow for the several submissions that are sure to be a little late.

2. Screen

All right. You've got trips. Now comes the review. You need to check that there are two appropriately rated leaders for the trip and that both are current Sierra Club members

with current first aid indicated in the on-line Chapter Leader List. It lists all active Chapter leaders along with their rating level (O-1, O, I, M, E), membership number and expiration date, first aid type and course completion date. For more information, see the Leader List Home Page. Understand that although most outings are open to the public, the leaders themselves must always be current Sierra Club members at the time of the outing.

Questions are sometimes asked if a leader must be a current member with current first aid at the time the write-up is submitted or if a leader can renew their membership or first aid later, just before an outing. As stated a few lines above, the requirement is to be current at the time of the outing. However, if the leader does not have current membership and first aid when the write-up is submitted, it greatly complicates the job of the outings chair, as the outings chair will then be responsible for following up on this to ensure that the leader is current at the time of the outing. While you might decide to allow this on a rare occasion, it should not be a common occurrence. And expect the Safety Committee reviewers to contact the outings chair if the Leader List does not indicate that the leader is fully qualified.

Is the trip itself appropriately rated as well as the leaders? If a non-standard route is being used, the difficulty rating may increase.

Is the trip appropriately described? This is especially critical for outings where people just show up without prior interaction with the leader. For hikes, the gain and distance should normally be provided. Be sure to indicate if this is an "easy" or "beginners welcome" hike or one for "tigers only," if dogs are allowed, if there are any restrictions on use of hiking poles, or any other special considerations.

If the planned outing is a Provisional Lead for a new leader, pay extra care in your screening process. Be especially sure that the observing leader is known to be experienced and capable for this event. For additional information on Provisional leads, see Chapter one of the LRB, which is available on the LTC web site (page 5 of the 16th Edition).

If you're not personally familiar with the trip, ask around among other leaders or members of your Management Committee (MC). The MC is ultimately responsible for the approval of outings, and you are their agent. The entire Management Committee should consider any questionable aspects of the trip. Does your entity allow the outings chair (OC) to approve outings? Or do your entity procedures require the OC to submit a trip list to the MC for approval?

Past Outings Chairs or the Outings Chairs of other GSCs are also important sources of information and experience. If in doubt as to some safety-related aspect of a trip, contact the Chapter Safety Committee (Charlie Knapke) for pre-approval. It's definitely better to make this connection sooner than later, while there may still be time to make changes. Any one-time requests for exceptions to leader requirements should be addressed to the Safety Chair for approval.

Outings may not be published until approved by the sponsoring GSC. For co-sponsored outings, the OC should

check that co-sponsors have approved such outings prior to forwarding the writeups for publication. Another GSC cannot be listed as a co-sponsor until the GSC has approved. If a co-sponsor has not approved an outing at the time of your newsletter's deadline, the co-sponsor's name must be deleted from the writeup.

3. Submit

Publication in Schedule: Now you really want to get these outings to the Schedule Editor ahead of the published deadline. The Editor will only publish trips submitted by a GSC Outings Chair. Trips submitted directly by leaders will **not** be accepted. The Editor will **NOT** accept late submissions. You don't have to wait until you have a complete package - you can submit trips in bunches as they come in. If any trips were not submitted in the proper format, then you'll need to correct this yourself. Check that name, address and phone info Directory forms are included for those leaders not currently in the Schedule.

The main thing is to get the writeups to the Editor before the deadline. After that, you still have time for at least several weeks to make minor corrections/updates. If the leader has not yet lined up an assistant, "To be announced" (TBA) may temporarily be listed in place of the assistant as you will be able to make **such** minor corrections when proofing the review copy you should get from the Schedule editor.

Almost time to relax - after you **review the proofs** from the Schedule Editor. You should get these about a month-and-a-half after the submission deadline. Check that everything was inputted properly: no errors or omissions. This is your last chance to change leaders or dates, or to fill in the missing TBA leaders. You can even cancel a trip now, but you certainly cannot add one. If there are any changes, you must get them back to the Editor within the specified deadline. If you're likely to be away when the proofs arrive, be sure to arrange for someone else to check them.

(TBA) "To Be Announced" Leaders: When submitting outings for the Schedule, sometimes it is just impossible to get the name of the assistant leader in time. By the time of the proofing of the schedule, you must confirm and approve an assistant leader. If you don't know the leaders, you can't screen them for appropriateness to the outing.

Publication of Leader Names: Scheduled outings must have two approved leaders for publication. The only exceptions allowed are certain repetitive local conditioning type "O" rated hikes. These outings are allowed to follow the practice of having a "hike committee" pool of rated leaders from which they draw the weekly leaders and may list the "so and so hike committee" in the write-up. The committee of rated leaders is to be listed elsewhere in the publication.

Newsletter Publication of Outings: Some outings may not be planned far enough in advance to enable them to be published in the Chapter Schedule. Such trips that failed to make the Schedule deadline may be published in your GSC newsletter or the *Southern Sierran* and become official Sierra Club Outings. Please follow the same screening process for trips published only in your GSC newsletter or

the *Southern Sierran* as you would for outings submitted to the Angeles Chapter Schedule.

[To officially be a Sierra Club outing, the outing must be sponsored and approved by some entity of the Club, with such approval documented in some Club publication. Within the Angeles Chapter, publication in a Sierra Club publication, whether the Schedule, *Southern Sierran*, or a GSC Newsletter is required to provide the documentation of such entity approval. Publication only on a web site is being discussed by the OMC and may be allowed if your entity policies permit this AND provide procedures for archiving the publication for 7 years.]

You may want to also republish in your Newsletter outings already sent in to the Chapter Schedule. It's definitely a plus for your subscribers to get advance notice of these trips well ahead of their appearance in the Chapter Schedule. Some events fill up early!

Finally, OCs should check that their GSC newsletter editor (NE) and web master are aware of - **and following** - the information in Attachment 2:

II. Additional Duties of the Outings Chair

After the approval and publication process is complete, your job is not yet finished:

Before the Trip

First, both outings chair and leaders need to verify that their write-ups were indeed published. If a write-up missed being published, the outings chair should attempt to have the writeup published elsewhere to avoid having to cancel the outing. If this proves impossible, contact the Safety Chair for guidance.

Be sure your leaders have the current version of the liability waiver/sign-in, Emergency Response/Patient Report, and Accident/Incident forms. The latest forms for Chapter use are located on the LTC web site.

And be prepared to help out in finding a replacement leader when one has to drop out. If a trip needs to be re-scheduled in the near term, try to get the word out. It does not have to officially be re-published but leaders should let you know when a trip has been re-scheduled for a later date.

Check to see if the leader and assistant have maintained current Sierra Club Membership and will be current during the outing. If leaders have let their membership lapse, they are no longer covered by the Club's Insurance Policy, and we cannot allow them to lead outings. Such leaders must renew their membership or alternate leaders must be found or the trip must be cancelled.

After the Trip

All right! This is what it's all about. Hopefully, everyone came back safe and, even if sore, pretty happy they went.

In the event there was a reportable incident or accident, you need to ensure that the leader has submitted a report ASAP [per the instructions on the Chapter version of the Incident Report Form - using the latest version of the form, available on the LTC web site.](#) The form and the distribution list

change periodically to comply with insurance requirements and Club policy. If it does not cause a significant delay in submittal, leaders should check the LTC web site to ensure they have the latest form prior to completing the form.

In any event, after every outing, the original of the liability waiver/sign-in sheet should come back to you. [The GSC Outings Chairs are responsible for storing copies for seven years, in case some problem arises.](#) If the original needs to be sent to national, then the OC should archive a legible copy along with a note indicating the location of the original copy.

The sign-in sheets are also useful as a means of tabulating info about what trips went and number of participants, etc., [so you will have this information available to complete year-end reports.](#) The LOSC periodically asks OCs to report such data.

[\[OPTIONAL AT THIS TIME.\] LSP Currency Requirement.](#) The on-line Chapter Leader List has (currently empty) blocks to track Lead Date and Lead Type. In the near future, outings chairs may be asked to supply the OMC with a list of leaders who have led outings for your entity during the previous year and to indicate whether any of the outings were Level 2 (i.e., backpacks away from cars). The Liability Waiver forms leaders send to outings chairs after each outing would be the source of the data. [\[See the following table.\]](#)

LEADERS CONDUCTING TRIP DURING 2007

Name of Ldr or Asst	Check if any of the Leads were Level 2

[Since both leaders on Chapter outings must be fully qualified, there is no need to distinguish between leader, co-leader, or assistant.](#)

If there are any complaints arising from an outing, you and your MC should try to deal with them within your own GSC. The Club policy is that problems should be dealt with at the lowest possible level. If complaints are directed to the Chapter ExComm, it will ask you to look into the matter. Safety-related issues should be brought to the attention of the Chapter Safety Committee.

Don't forget to encourage trip reports for your Newsletter. These are usually written by one of the leaders, but it could be from a participant. Try to have it informative (so that it will be useful in planning future outings to the area) - and entertaining.

Did you know that the *Southern Sierran* is most eager to run outings stories? Well, now you know. This is a great opportunity to publicize your GSC.

Recruitment – Members

Many of us joined the Sierra Club after we went on a Club outing. It'd be great if leaders had membership info available to give to prospective members. This is also an ideal way, of course, to enlarge your own GSC roster. We want to sustain an outings culture that makes everyone feel welcome and at ease, members and non-members alike. A

special outreach effort should always be made to welcome newcomers.

The Outings Field Recruitment Incentive Program (FRIP) was designed to encourage entities to recruit new members on outings. Members who join on outings are likely to become activists. And new members not only generate revenue for the club's national conservation campaigns, they provide crucial funds for your local conservation and education programs through a FRIP rebate of part of the new member's dues to the sponsoring entity. For more information, go to <http://clubhouse.sierraclub.org/membership/Field/FRIPBrochure.PDF>

Recruitment – Leaders

All your leaders and your MC should be on the lookout for up-and-coming prospective leaders. Encourage such people to get involved with your GSC and to enroll in the Chapter's Leadership Training Program. Also, encourage your "O" Leaders to get their "I" Leader ratings, etc. Most good leader prospects need someone to ask them to become a leader; they don't volunteer. They will be honored you asked and will like to go **though** LTP when you encourage them.

The Chapter is divided into a number of regional Groups. Are you aware that the on-line Leader List allows you to select and obtain a list of leaders whose mailing addresses are within your regional Group? There are probably a lot more rated leaders in your Group's boundaries than lead for your Group. Some became leaders through the various activity sections and may never have had any contact with your Group. Connect and invite them to lead for you - or to have your Group co-sponsor outings they lead for an activity section.

Leader Retention. Retain your leaders by keeping track of their certifications. For example, there are currency requirements for first aid (or wilderness first aid for mountaineering outings) and for policy updates. Gently remind your leaders of these requirements and offer opportunities for easy re-certification. Several entities have scheduled first aid and OLT training as part of their pot luck parties where leaders meet to plan outings for the next Schedule period.

Final point here - honor your leaders. Do what you can to make their jobs easier. Make sure they feel appreciated. Recognize them in your Newsletter and at awards banquets.

III. Guidelines for Special Types of Outings

Certain types of outings require special approval procedures in addition to the normal procedures described above. **This will not be an exhaustive description of these "special" types of outings.** If your GSC conducts these types of outings, you will need to be very familiar with these additional steps to be followed. If you have any questions, please contact the chair of the Outings Management Committee or Safety Committee.

Provisional Leads

Please see the LRB for additional guidelines for these outings. When submitting a Provisional Lead to the Schedule editor, please indicate Provisional Leader instead of Leader in the writeup. Also, remember that provisional leads must not have a co-leader. To satisfy provisional lead requirements, the provisional leader must be the sole leader with the mentor listed as Asst. Provisional leaders are not authorized to assist or co-lead outings.

If the leader is not yet a Provisional Leader, but plans on having their prerequisites in place prior to the trip date, please make sure they have a reasonable plan in place to be ready prior to the trip, and follow up with them to ensure that they have completed all necessary items prior to the trip. If a provisional leader is not listed in the Chapter Leader List at the time of the Safety Committee review, expect to be contacted by the reviewer.

Technical Outing

Certain outings can only be lead by qualified "T" rated leaders granted by the sponsoring GSC. These outings should be listed in the Schedule as "TO", "TI", "TM", "TE" outings. The trip leaders must have a current Chapter O/I/M/E-rating in addition to the GSC "T" rating. For example: A ski mountaineering trip with a peak climb might be a TM if ice axe is used. River touring with rapids might be a TO unless land navigation is required; if belayed portages around falls are required, it might be a TM. The Group or Section safety policy should require appropriate leader first aid training for T outings (i.e., TO may need more specialized first aid or rescue training than the Chapter O rating requires, but the outing is otherwise an O). **Please provide the Safety Chair with an updated copy of your Group's certified "T" leader list each year.**

Restricted Outings

Certain categories of outings have special rules due to their high risk and restrictions in Sierra Club's insurance policies. Restricted Outings categories are:

- International Outings
- Watercraft Outings
- Youth Oriented Outings
- Challenge Courses (e.g., "Ropes Courses")
- Mountaineering Outings

Most such trips require national approval BEFORE the trip can be published. And each of these categories has a policy that must be followed, as well as suggested guidelines for conducting such outings. Before approving or leading a restricted outing, you must be familiar with these policies and guidelines. [The Restricted Outings web site](#) (see page 16) identifies current regulations about these types of outings (and contains links to lists of approved outings). Club policies are subject to change each year as our insurance is renewed.

International Outings: Trips traveling outside the US and Canada need national Club approval prior to publication. This includes day-trips into Mexico. Please attach a note to trip writeups indicating you have submitted it to National and are awaiting approval. You must confirm approval has been granted prior to publication. Also note that National

requires an insurance fee for international outings. Refer to the latest [Application for Foreign Outing form for the current fee](#).

Watercraft and Rafting trips: Sierra Club Insurance has restrictions on these types of outings and National approval may be required. Leaders and outings chairs must be familiar with current policy. Check the Restricted Outings web site ([see pg 16](#)) for the latest policies on Watercraft Outings prior to approving such outings. If you sponsor one of these types of outings, make sure to note on the submittal to the Schedule Editor that the trip is awaiting approval from National. You will need to obtain this approval prior to the final “proof” review so that you can confirm that the outing is approved prior to publication.

Restricted Mountaineering Outings and Mountaineering Training Outings: These outings involving the use of ice ax, crampons, ropes or other climbing aids are restricted to Sierra Club Members only. Approval for these outings must follow an approval process that includes the National Mountaineering Oversight Committee (MOC).

If your GSC is authorized by your GSC Safety Policy to conduct these outings, you will already have the appropriate forms and procedures. The following Chapter GSCs have such approval: DPS, SMS, SPS, LTC, WTC. Other GSCs may not sponsor or co-sponsor restricted outings.

Tina Bowman currently chairs the MOC that approves these outings. These trips should be submitted to Tina at the same time that you send them to the Schedule Editor. You should have approval back prior to the schedule proof deadline.

Please make sure the trip write-up indicates that the trip is for Sierra Club Members only. The outing must be listed as an “M” or “E” outing in the schedule, not just an “R” outing.

Of important note: When submitting a write-up for such an outing to the Schedule Editor, please attach a note indicating that it is a restricted outing and it should be included in the Schedule pending approval by MOC. When proofing the Schedule, make sure that the national MOC web site indicates that the outing has been approved. Restricted Outings may not be published until the web site indicates that the outing has been approved. If not approved at the time of Safety Committee review, the write-up will be deleted from the Schedule.

Sellers of Travel Requirement. If your entity collects outings fees in advance that are over \$50, you need to be familiar with the Club’s Policy and related FAQs concerning California Seller of Travel Law. These are available at:

<http://clubhouse.sierraclub.org/outings/policy/>
<http://clubhouse.sierraclub.org/outings/faq/>

For these outings, the Outings Chair must work in concert with the entity Treasurer. Typically, these trips require the use of a special bank account and have special rules for consumer protection.

IV. Additional Outings Chair Resources

1. The Chapter *Safety Committee Report* has already been mentioned. In the rear of it you'll find various forms, e.g., Accident/Incident Report, Emergency Report, etc. Also check the LTC web site and the Outings Extranet. Note that some forms are located in both locations but that the Chapter LTC site will have forms that are customized for use in the Angeles Chapter.

2. You should have a fairly recent edition of the Leader Reference Book (LRB). The 16th edition was published in 2006 and contains many updates and new information. This book offers a goldmine of outings information and you should be familiar with it, especially with the process/requirements for becoming a rated leader at various levels. The book can be purchased by contacting the LTP Registrar.

If it has been some time since you received your own leader rating, it might be a good idea, as a refresher, to attend the LTP Lectures. The Lectures are conducted twice a year; usually mid-April and mid-October. You want to be sure your GSC’s prospective leaders are aware of these dates and the deadlines for application.

3. The National Sierra Club Outings Department provides support to Chapters and their entities through the Local Outings Support Committee (LOSC). The LOSC is currently listed in front of our Schedule under the National Chapter and Groups Outings Coordinator (on the same page as the OMC, LTC and Safety Committee). The local LOSC representative is currently Marc Hertz.

The LOSC publishes an Outings Newsletter (*GCO News*) several times a year. It is distributed electronically. The Outings Department may also distribute an annual mid-year mailing. Both these documents are invaluable resources. As an Angeles Chapter Outings Chair, you should be on distribution for these documents (if your name is listed in WILD as an outings chair). If you haven't been getting them, ask your entity Chair to check that your name is listed in WILD as an outings chair - and to submit an update to WILD if your name is not there.

4. Once a year, normally early February, the Chapter hosts the **Chapter Volunteers' Workshop** on a Saturday. There are sessions for treasurers and newsletter editors, plus one for Outings Chairs!! Come share and learn.

5. When you took over as Outings Chair, your predecessor should have handed on to you various files (e.g., signed copies of liability waivers). Keep these materials organized and updated - and pass these documents and this set of instructions on to your ultimate successor. Then, finally, your job will be done! We know this guideline is a little long, but we wanted it to answer your questions, to help you do your job, and to be a resource for questions that come up from time to time.

Again, thanks so much for all you do, the absolutely critical role you play, in contributing to the incredible success of the Angeles Chapter's outstanding Outings Program. It couldn't

happen without you. Know that your efforts are greatly valued and appreciated.

V. Attachments

1. Outings Chair Training and Web Publication
2. Information for Newsletter Editors and Web Masters
3. Index to National Policies and Guidelines
4. Information For Outings Leaders
5. Angeles Chapter Leader List
6. Inactive/Retired Leaders (without first aid)
7. Commonly Used Forms:

Sign-In Sheet and Liability Waiver (National)

The form included with this report is the typical form signed by all the participants. Refer to the LTC or Clubhouse web sites for (1) the Individual form that is signed by only one participant or (2) the form used on mountaineering restricted trips or (3) other versions. The Clubhouse/local outings web site also has a Spanish language version of the form.

Medical Treatment Authorization and Consent Form (National)

Incident Report Form (Angeles Chapter)

This form has been tailored for the Angeles Chapter to satisfy Chapter reporting requirements. The national form may be used if the reporting instructions on the Chapter form are followed. The latest version of the Chapter form is available on the LTC web site. If it does not cause a significant delay in submittal, leaders should check the LTC web site for the latest version before completing this form. All leaders need to discard old versions of this form. Recent change: The copy for the Safety Committee should be sent directly to Ron Campbell rather than to the Safety Chair.

Emergency Response - Patient Report (National)

A form tailored for the Angeles Chapter to include a requirement for reporting Lost Persons will be added to the LTC web site in the near future. The national form may be used for reporting accidents if copies of the Chapter form are not available.

Chapter leaders should carry two copies of this form on all outings. See additional instructions on top of form.

Safety Management/Emergency Response Plan (National)

This national form has been added to this issue of the Safety Report at the request of Safety Committee members. Entities are encouraged to assemble data for the areas they commonly hike in to assist leaders in completing this form. Outings chairs should encourage their leaders to use the form, especially for the longer trips.

Attachment 1

Outings Chair Training and Web Publication

Several years ago, the Club started conducting an annual Outings Chair Training (OCT). A Chapter version of the OCT has now been prepared (primarily by Phil Wheeler) and the first conduct of the local OCT is scheduled for early 2008.

Reason why an experienced outings chair should attend:

At this time, the Chapter Safety Policy requires the Safety Committee to review publications for outings safety - and that causes an extra delay in the approval process. The OMC has decided that the Safety Committee may delegate the safety review to GSC outings chairs under certain conditions. One of the conditions is that the outings chair has completed the Chapter's OCT - in order to ensure that the OC are familiar with Club policies and understand what must be done.

Initially, delegation for outings chairs to conduct the safety review will be limited to uncomplicated O Level 1 outings. If that proceeds without problems, this will likely be expanded to include O Level 2 outings and possibly I-level outings.

Why bother? A number of entities want to publish outings only on their web site and not bother with a paper newsletter. And they do not want to wait for the Safety Committee to complete a safety review. By authorizing an outings chair to perform the safety review, the lead time between planning an outing and web publication can be minimized.

What else is required for web only publication of outings?

1. Outings Chairs must review their entity procedures to ensure that such procedures do not require publication in the GSC Newsletter. [The SPS is one section that currently does have such a restriction.] If there is such a requirement, the procedures will need to be changed.

2. A GSC must establish a procedure for archiving the web publication (for 7 years). The OMC has specified a paper archive. One way of accomplishing this is to do a screen capture, print a copy and hand mark with the date. To avoid abuse of the system, the OMC will likely specify that an outing must be displayed some minimum time (perhaps two days or a week) prior to an outing. [Eventually (possibly by the end of this year), the archive task will likely be automated at the Chapter level.]

3. The GSC must notify the Safety Committee that web publication is happening and provide the Committee with access to the web site for oversight purposes.

What happens when an outings chair is replaced? A new outings chair will need to apply to the Safety Committee and be approved to perform the safety review. Until that happens, outings will need to be sent to the Safety Committee in time to allow a safety review. GSCs can avoid this problem by planning ahead and having a future outings chair approved prior to taking over the job.

Will GSCs still be required to send copies of newsletters to the Safety Committee? Yes! The Safety Committee still has responsibility for oversight of the outings program and will continue to monitor newsletters.

Attachment 2

Information for Newsletter Editors and Web Masters

1. Newsletter editors and web masters may accept trip writeups only from the Outings Chair. If any writeup is received directly from a leader, the writeup must be submitted to the Outings Chair for approval before being published.

1A. Writeups for restricted trips cannot be published until approval has been obtained from the national approving agency. The Outings Chair ensures that such approval has been obtained before approving writeups for publication.

2. Co-Sponsored Trips: The primary sponsor must be listed first in the header wherever published. The primary sponsor is the entity that will take the lead in any incident investigation. Example: For an outing co-sponsored by SPS and WTC, the header will indicate SPS-WTC in the newsletter of both entities if the SPS is the primary sponsor - or will indicate WTC-SPS if WTC is the primary sponsor.

[2A.] If an entity newsletter or web site publishes outings sponsored by a different entity, the sponsor's name must be indicated in the header.

[2B.] Outings that are published only in your entity newsletter or web site should be marked so that the Safety Committee (as well as other readers) can tell these outings apart from those published in the Schedule. A simple "the following additional trips were not published in the Schedule" or other distinguishing note or symbol will do. The Safety Committee reviews writeups in the newsletters and this note will help speed up the review process by minimizing redundant review of trips also published in the Schedule.

4. Complete writeups are to be published as approved by the Outings Chair. Once the complete writeup has been published, a brief list of outings may be published in future issues along with a reference to where the complete writeups may be found. If any change other than minor editorial corrections are made, the writeups must be returned to the Outings Chair for approval to ensure that critical information has not been changed or omitted.

5. **Entity Outings Chairs must ensure that copies of all newsletters are sent to the Safety Committee for review.** If you send paper copies, send them to Barbara Reber and Erik Siering. If you send electronic copies, send them to Charlie Knapke and Erik Siering. If you want to obtain an advanced approval for a questionable outing, contact Charlie Knapke. [Charlie and Erik also review the proof copies of the Schedule.] Erik's review concentrates on safety and feasibility of outing as planned. Charlie/Barbara concentrate more on leader qualifications for planned outings.

6. The following documents must be archived for 7 years. If your entity policies do not specify otherwise, such archives are to be maintained by the volunteer indicated in () below. When the current volunteer is replaced, the archived documents are to be transferred to the new volunteer along with instructions concerning this archive requirement.

a. Newsletters that document entity approval of Club activities or publicize outings (newsletter editor).

b. If outings/other activities are published only on web site: Screen capture of web page showing writeups marked to indicate first date that writeup was added to web site. (web master)

c. Management Committee meeting minutes that document approval for entity sponsored activities (i.e., meetings, other activities, and outings). (secretary, unless these are published in newsletter or on web site)

7. At this time, the Club requires that all newsletters or web sites that publish outings must include the following three notices:

In order to participate on one of the Sierra Club's outings, you will need to sign a liability waiver. If you would like to read a copy of the waiver prior to the outing, please see <http://sierraclub.org/outings/chapter/forms> or call 415-977-5528.

In the interest of facilitating the logistics of some outings, it is customary that participants make carpooling arrangements. The Sierra Club does not have insurance for carpooling arrangements and assumes no liability for them. Carpooling ride sharing or anything similar is strictly a private arrangement among the participants. Participants assume the risks associated with this travel.

CST 2087766-40. Registration as a seller of travel does not constitute approval by the State of California."

The notices should be located in the same section of your newsletter or website that includes the outings writeups. The font size can be slightly smaller than that used for describing outings, but must be clearly legible. See the following web site for more details
<http://clubhouse.sierraclub.org/outings/policy/publishing.asp>

Can non-Sierra Club outings and activities be listed in Sierra Club publications? Yes, but there are restrictions and specific requirements that must be followed. If your entity newsletter or web site publishes non-Club events, see the above URL for more details.

Can Sierra Club outings and activities sponsored by other Chapters be listed in Angeles Chapter publications? Yes, but the publication should clearly indicate that such outings or activities are not sponsored by the Angeles Chapter.

The Sierra Club has a web site and a listserv for newsletter editors. For more information, go to:
<http://clubhouse.sierraclub.org/communications/newsletters/>

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Index to National Policies and Guidelines

<http://clubhouse.sierraclub.org/outings/policy/>

Policies and Guidelines

Policies are rules set by a Sierra Club volunteer committee. They ensure that all outings meet Sierra Club's legal, insurance, and/or safety requirements. Some policies apply to all Sierra Club outing programs and others are for specific programs or entities. All outing programs must follow the policies that apply to them.

Many outing policies are paired with a set of **guidelines**. These are suggested courses of action that an outing program can take in order to comply with the policy. Entities may choose whether or not to follow guidelines, as long as they adhere to the underlying policy.

Policies for All Outings

- [Definition of a Sierra Club Outing](#)
- [First Aid Policy and Guidelines for Outings](#)
- [Herbicides and Pesticides on Outings](#)
- [Liability Waivers](#)
- [Leader Standards for all Outings Leaders](#)
- [Location Advisory](#)
- Revised - [Prescription Medicine on Outings](#)
- [Publishing Sierra Club Sponsored Activities](#)
- [Third-Party Services](#)
- [Transportation on Outings](#)

Guidelines for All Outings

- [Leader Owned Cabins](#)
- [Leader Owned Outings Equipment](#)
- [Participant Screening](#)
- [Problem Behaviors](#)
- [Use of Leader Contact Information](#)
- [Use of Contact Information from Waivers on Outings](#)

Policies for Specific Kinds of Outings

- [Challenge Course Outings](#)
- [Group and Chapter International Outings](#)
- [Mountaineering Policy and Related Insurance Requirements](#)
- [Watercraft Outings](#)
- [Youth-Oriented Outings](#)

Policies and Guidelines for Specific Outing Programs

- [National Outings](#)
- [Local Outings](#)
 - Charges for Outings
 - Commissary

- Concessionaires
- Conflict Resolution
- Cultural Resources
- International Outings
- Fundraising Outings
- Pets on Outings
- [Inner City Outings](#)
 - Alcohol and Drugs
 - Administering of Medications
 - Emergency Medical Preparedness
 - Leader Screening Process
 - Sexual Harassment

Sierra Club Insurance Policy

For information on Sierra Club's insurance coverage and restrictions, read the [Insurance Manual](#).

Leader Conduct Policies and Guidelines

(For all Sierra Club leaders)

- [Removal of Leaders](#)
- [Conflict of Interest](#)
- [Conflict Resolution](#)
- [Sexual Harassment](#)
- [Standards of Conduct](#)
- [Volunteer-Staff Relations](#)

Outings Related Conservation Policies

- [All Sierra Club Conservation Policies](#)
- [Archaeological Sites](#)
- [Eco-tourism](#)
- [Forest Management](#)
- [Off-Road Use of Bicycles](#)
- [User Fees on Public Lands](#)
- [Winter Sports](#)

Last updated on 04/20/2006

Restricted Outings

<http://clubhouse.sierraclub.org/outings/Common/restricted.asp>

Certain categories of outings have special rules due to their high risk and restrictions in Sierra Club's insurance policies. Restricted Outings categories are:

- [Mountaineering and Rock Climbing Policy](#)
- [Watercraft Outings](#)
- [Challenge Courses](#) (e.g., "Ropes Courses")
- [Youth Oriented Outings](#)
- [International Outings](#)

FAQs (Questions and Answers)

<http://clubhouse.sierraclub.org/outings/faq/>

Here are some of the many questions we get asked:

- [California Sellers of Travel](#)
- [First Aid and Medical Resources](#)
- [Free days](#)
- [ICO Equipment Acquisition](#)
- [ICO Treasurer](#)
- [Insurance](#)
- [LEADERS](#) (national leader database)
- [Liability Waivers](#)
- [Local Outings](#)
- [Local Outings International Outings](#)
- [Medical](#)
 - General Questions
 - First Aid Questions
 - Medical Protocols
 - Anaphylaxis and Epinephrine
 - Over the Counter Medication Questions
 - Medical Screening Questions
- [Mountaineering](#)
- [OLT 101](#) (renew every 4 years)
- [OLT 201](#) (for overnight outings)
- [Outdoor Outreach](#)
- [Permits](#)
- [Publicity](#)
- [Third-Party Services](#)
- [Tool Use on Outings](#)
- [Transportation](#)
- [Watercraft Outings](#)
- [WFA Workshop and Scholarship Applications](#)
- [Youth Oriented Outings](#)

Outings Leader Training - Basic (OLT 101)

<http://clubhouse.sierraclub.org/outings/training/intro/olt101/>

Clubhouse - <http://clubhouse.sierraclub.org/>

Outings Extranet: From Clubhouse, select Outings

The information below supplements information in the national Outings Leader Training (OLT) 101 text and in the Outings Leader Handbook (OLH). This document contains a number of references to the OLH and to the Outings Extranet for additional information on specific topics. Text in italics is a direct quote from the listed URL. Refer to the URL for additional information that may not have been included here.

If you read this Supplement prior to 4/1/08, please check the LTC web site prior to 7/1/08 for changes or updates.

GLOSSARY OF NATIONAL TERMS

- GCO Group and Chapter Outings (See LO)
- GCOC (GCOC was renamed LOSC)
- Entity An organization of the Sierra Club (see GSC)
- ICO Inner City Outings (usually youth oriented)
- Level 1 Day hike or car camp
- Level 2 Backpack away from cars
- LO Local Outings (rather than ICO or National Outings)
- LOSC Local Outings Support Committee (see GCOC)
- LSP Leader Standards Policy
- OLH Outings Leader Handbook (revised 2007)
- OLT Outings Leader Training
- OLT 101 Basic OLT - Includes Club policies; must be renewed every four years
- OLT 201 Advanced OLT - Includes Group Management, Interpersonal Leadership, Safety Management Planning (part of LTP lectures; required for new Level 2 leaders once only; does not need to be renewed every four years like OLT 101)
- Outings Extranet <http://clubhouse.sierraclub.org/outings/>

GLOSSARY OF CHAPTER TERMS

- Comm Committee
- ExComm Executive Committee
- GSC Group, Section or Committee; i.e., a Chapter entity
- LRB Leaders Reference Book (Chapter)
- LTC Leadership Training Committee (Chapter)
- LTP Leadership Training Program (Chapter)
- O-1 O Level 1 outing; i.e., day hike or car camp
- OMC Outings Management Committee (Chapter)
- Schedule Schedule of Activities (Chapter)
- LTC Web Site <http://angeles.sierraclub.org/ltc>
- Outings Web Site <http://angeles.sierraclub.org/outings>

Readers are expected to be familiar with the above Chapter terms and with the information in the front of the Chapter Schedule under the headers Trip Reservations and Activities Requirements (also available at the following URL under Rules of Conduct and Outings Policies: <http://angeles.sierraclub.org/outings/Outings.asp>)

ANGELES CHAPTER OUTINGS LEADER REQUIREMENTS

The Angeles Chapter has a much more sophisticated outings program than most other chapters and, due to size, has additional regulations and policies - and forms tailored to satisfy Chapter requirements. Leaders of Angeles Chapter outings are responsible for knowing the information, policies, and requirements indicated below.

To lead or assist on an outing for the Angeles Chapter, a leader must:

1. Be listed in the Angeles Chapter on-line Leader List with:
 - a. A leader rating appropriate for the planned outing
 - b. Current Sierra Club membership
 - c. First aid certification that meets the National Leader Standards Policy. [See First Aid Requirement on pg 18.]

d. [Effective 7/1/08] An indication of having completed OLT 101 since 1/1/2008 and having read this Chapter supplement - to update their knowledge of Club and Chapter policies. [See Policy Update Requirement on pg 18.].

2. Be familiar with the Chapter Safety Policy (available on the LTC web site).

3. For I/M/E/T outings, also be familiar with their entity Safety Policies (available from the entity Outings Chair). All entities sponsoring or co-sponsoring outings above the O level or outings of a specialized nature other than hiking must have an approved safety policy. Refer to the tables below for a list of such approved policies. Entities not listed in tables below can sponsor or co-sponsor only O-level outings. (See Chapter Schedule for full names of entities.)

Approved Safety Policies And Procedures

Level	Groups	Sections	Comm	
I			K-9 Low. Pks	
M *	A-M AV CV ESGV LB Mt.B	Pas. PV-SB Hondo SFV VH WLA	20-30s GLS HPS ICS NST OCSS SSS WA	B-P BTC Camera History SMMTF
E		DPS SPS SMS	LTC WTC	

*Orange County Group safety policy was recently rescinded and deleted from list per OC Outings Chair request.

T Level (Technical) with type of specialized outings listed.

SCUBA Diving, Sailing	A-M Gp	SSS	20-30s
Sailing	OCSS		
Water Travel	RTS		
Alpine Skiing	ASMC	SMS	

4. Receive approval to lead each outing from the Outings Chair of the entity/entities sponsoring the outing.

NOTE: Sierra Club outings leaders from other chapters - who have completed the Club's OLT 101 and read this supplement - may be able to obtain a one-time waiver to assist on an Angeles Chapter O-level outing by contacting the Safety Committee Chair.

At least two leaders are required for each Chapter outing. Large outings may require additional leaders. Each leader must normally be certified to at least the level of the trip difficulty. Under special circumstances, the Safety Chair may grant special exemption for one of the leaders to be certified at a lower level than indicated in the trip write up. Provisional leaders (listed as such in the Chapter Leader List) may schedule and lead the outings needed to satisfy the certification requirements.

CHAPTER VERSION OF OUTINGS FORMS

The LTC web site has the latest version of commonly used outings forms, including the following forms - that are to be used on Chapter Outings:

Liability Waiver Sign-In Form
Emergency Report - Patient Form
Incident Report Form

Each leader and assistant should carry two copies of the Emergency Report form on outings. In case outside help is needed, one completed copy is to be retained on site and the other copy is to be carried out by the person going for outside help.

Lost Participants - [See OLH pg 38] The Chapter version of the Emergency Response form includes a section (that is not on the national form) for use with Lost Participants.

NATIONAL FORMS AND INFORMATION

If you can't find information you need in the LRB or on the [LTC web site](#), then try the national [Outings Extranet](#).

The Outings Extranet has National Policies, Guidelines, FAQs, and forms, some of which are referenced in this text. If you do not know the userID and password to access the non-public Outings Extranet, ask your Outings Chair.

An index to Sierra Club Outings policies, guidelines, FAQs and Forms can be found at:

<http://clubhouse.sierraclub.org/outings/GCO/policy.asp>
<http://clubhouse.sierraclub.org/outings/faq>
<http://clubhouse.sierraclub.org/outings/gco/forms.asp>

NATIONAL LEADER STANDARDS POLICY REQUIREMENTS

<http://clubhouse.sierraclub.org/outings/policy/requirements.asp>

The National [Leader Standards Policy](#) (LSP) was adopted by the Outdoor Activities Governance Committee (OAGC) on July 1, 2004. The policy distinguishes Level 1 outings (day hikes and car camps) from Level 2 outings (backpacks away from cars) and requires that new Level 2 leaders complete at least one provisional lead that includes an overnight stay away from cars.

The LSP also indicates: *The leader of any Sierra Club Outing must...Have First Aid certification equivalent to or higher than American Red Cross Basic.*

[**Currency**] The Policy further states: *Every four years from the date a leader first met all requirements to lead an outing, regardless of level, OLT 101 must be refreshed and any lapsed first aid certifications must be renewed. Further, if a leader has not led a trip at a given level in the previous four years, then the leader must repeat the requirement to Provisionally Lead at that level or higher before leading an outing at the given level, or otherwise satisfy the Entity outing chair that the leader continues to possess the requisite skills.*

1. First Aid Requirement - All leaders and assistants on Angeles Chapter sponsored outings must comply with the [LSP first aid requirement](#). Leaders who do not meet the

requirement cannot lead or assist on outings until they obtain first aid certification.

Effective 7/1/08: All leaders and assistants must have completed a qualifying first aid course within the last four years prior to an outing.

Red Cross Basic First Aid or equivalent satisfies the LSP first aid requirement. Wilderness First Aid is recommended, but is not required by LSP. (A physician, nurse, or other currently practicing medical professional need not take a basic first aid course if he or she has first aid knowledge equivalent to or higher than American Red Cross Basic.)

CPR is recommended but is not required by LSP. CPR does NOT satisfy the LSP first aid requirement.

Under certain circumstances, an on-line course may be acceptable for [renewal](#) of standard first aid, provided current certification was obtained in a classroom and is still current. A list of acceptable on-line providers for basic first aid class [renewals](#) may soon be available on the national web site. Some entities may have additional restrictions, so leaders should check carefully before following this option.

After completing a first aid course, leaders need to notify their outings chair so that the Chapter Leader List can be updated. The following information is needed to update the first aid record in the Chapter Leader List: (a) date of course completion and (b) type of course (i.e., whether standard or wilderness first aid).

2. Policy Update Requirement. To lead outings on or after 7/1/08, all Chapter leaders must have updated their knowledge of Club and Chapter Policy through completion of OLT 101 (or equivalent) along with an Angeles Chapter Supplement (i.e., this document). The easiest way of satisfying the OLT 101 requirement is probably to either:

(1) Read the national [Outings Leader Handbook](#) (OLH) (revised 10/20/07) which is available for download at <http://clubhouse.sierraclub.org/outings/common/handbook.asp>

or

(2) Read the OLT 101 text/referenced material and complete a 25-question self-assessment (i.e., test) available at: <http://clubhouse.sierraclub.org/outings/training/intro/olt101/index.asp>
<http://clubhouse.sierraclub.org/outings/training/intro/olt101/SelfAssessment.asp>

NOTE: There is a special OLT 101 text and self-assessment for ICO (Inner City Outings) leaders, available at:

<http://clubhouse.sierraclub.org/outings/training/intro/olt101/ICO/index.asp>
<http://clubhouse.sierraclub.org/outings/training/intro/olt101/ICO/SelfAssessment.asp>

This Angeles Chapter Supplement generally covers material not in the OLH and documents differences between Chapter and National requirements. It is available at the [LTC web site](#).

After completing OLT 101 and reading this supplement, leaders should notify their outings chair so that the Chapter Leader List can be updated to reflect this completion. Outings Chairs should collect all inputs and send a periodic update of changes to the Chapter database.

3. **Backpack Requirement** - New O-level leaders certified since 7/1/04 who have not led a Level 2 (i.e., overnight) outing are certified as O-1 (i.e., O Level 1) leaders who may lead day hikes and car camps but not backpacks. Such O-1 leaders may subsequently upgrade to regular O status by completing a provisional lead of a backpack. Existing leaders as of 7/1/04 were grandfathered to Level 2 status.

WHEN NATIONAL APPROVAL IS REQUIRED

http://clubhouse.sierraclub.org/finance/risk_manual/when_contact.asp
http://clubhouse.sierraclub.org/finance/risk_manual/ques_ans.asp
<http://clubhouse.sierraclub.org/outings/Insurance/index.asp>

The following is a partial list of activities that may require review and approval at the national Club office:

1. Events co-sponsored with a non-Club organization.
2. Events requiring agreements with *hold harmless / indemnification clauses and/or insurance requirements*.
3. Events where: (a) *alcohol will be sold or served*; (b) *professional food concessionaires will be used*; or (c) *minors will be attending without parent or guardian*.
4. Outings involving use of a third party - such as a guide service or chartered transportation. See OLH pg 47-48.
5. Restricted outings (See next paragraph.)

RESTRICTED OUTINGS

<http://clubhouse.sierraclub.org/outings/Common/restricted.asp>

[See OLH pg 20] The following types of outings have special restrictions and require approval from the Local Outings staff at the National Office prior to advertising the outing. See OLH pg 57-58 for the restricted outing approval process. Refer to the references indicated below for more information on the specific types of outings:

- a. *Any outing involving a challenge course (e.g., a ropes course)*. See OLH pg 49-50.
- b. *Any outing in a foreign country (or cruise to a foreign port), with the exception of Canada*. See OLH pg 50-51 and http://clubhouse.sierraclub.org/outings/GCO/intl_FAQ.asp
- c. *Any outing that uses a concessionaire or non-Sierra Club leaders, with or without payment, for the operation or chartering of a watercraft*. [See OLH pg 47-48 and <http://clubhouse.sierraclub.org/outings/FAQ/watercraft.asp> and http://clubhouse.sierraclub.org/finance/risk_manual/ques_ans.asp

Trips that do not require approval from the national office: (1) Trips that use a concessionaire for the hiring of equipment only and no guiding service (such as renting canoes and (2) Regularly scheduled cruises, such as ferries.

- d. *Any outing that uses watercraft more than 50 feet in length (other than regularly scheduled ferries)*. [See OLH pg 53-55 and <http://clubhouse.sierraclub.org/outings/FAQ/watercraft.asp>
- e. *Any outing whose primary focus is to youth under the age of 18 without the supervision of a parent or guardian*. See OLH pg 56-57 and http://clubhouse.sierraclub.org/outings/policy/youth_outingsFAQ.asp

f. *Any activity or outing that may require the use of any of the following pieces of equipment: ropes, pitons, jam nuts, runners, bolts, ice axes, or carabiners*. See OLH pg 51-53 and <http://clubhouse.sierraclub.org/outings/policy/mountaineering.asp>

Mountaineering activities using ropes, ice axes, crampons, etc., are permissible on outings that have obtained special approval. Currently, only the DPS, LTC, SMS, SPS, and WTC have approval to conduct these outings. Application to National must be made for each outing, and these trips are restricted to Club members only. Contact the Outings Chairs of the sponsoring entities or the Safety Chair, for more information.

The following URL has a link to a list of approved mountaineering and international outings. Outings Chairs need to contact the Local Outings Manager to determine approval status of other restricted trips.

<http://clubhouse.sierraclub.org/outings/Common/restricted.asp>

OUTINGS OUTSIDE ANGELES CHAPTER BOUNDARIES

Before planning an outing outside Chapter borders, a leader needs to check for Location Advisories. Refer to page 21 of the OLH and to http://clubhouse.sierraclub.org/outings/outreach/location_advisories/advisories.asp

At this web site, select Current Location Advisories to determine any current restrictions. There are currently (1/08) advisories only for AZ, FL, GA, and CA. The CA advisories are for: (1) East Facing San Jacinto Mtns below 3800' and all of Santa Rosa Mountains north of Anza Borrego below 3800' and (2) Red Hills Recreation Area.

PETS ON OUTINGS

<http://clubhouse.sierraclub.org/outings/GCO/policy.asp>

Pets shall be permitted only on outings that are pre-advertised as pet-permitting outings. (Seeing-eye dogs are an exception to this rule.) Pet-permitting outings must be only to places where pets are legal, and must be only to places that are acceptable to the Chapter's outings conservation committee.

For guide dog in training guidelines, see <http://clubhouse.sierraclub.org/outings/gco/FAQ>

CELL PHONES

The use of cell phones and communications radios should be managed by outing sponsors and outing leaders. Note that safety requires that groups be kept together, and that the use of a radio to keep contact between a sweep and the leader does not alleviate the need to keep the entire group in visual contact and under control.

PUBLICATION OF OUTINGS

Q - Can a leader send a trip writeup directly to an entity newsletter?

A - No! Leaders should send trip writeups to the Outings Chairs of all the sponsoring entities The Outings Chairs must

approve the writeup before forwarding for publication. For co-sponsored trips, the primary sponsor must always be listed first in the header wherever the writeup is published. The primary sponsor is the one that would investigate any incidents that occurred on an outing.

PARTICIPANT SCREENING

The leaders of an outing are responsible for screening participants to ensure that they are qualified and properly equipped for a particular outing. The Chapter is totally supportive of leaders and sponsoring entities carrying out this function. The "Rules of Conduct" state that participation on outings is a privilege which may be denied by the leaders.

There are a number of things on which this determination may be based: physical conditioning, mental or emotional state, equipment, experience, skill level, or group compatibility. Leaders are responsible for the safe and hopefully enjoyable conduct of outings. They act as agents of the Club in making judgments necessary to prevent participation by people who may not meet the established criteria. Some individuals will be unhappy with being denied involvement in an outing of their choice. But that is the unfortunate consequence of making responsible judgments in this regard.

Refer to the Chapter Rules of Conduct (in the Schedule) and OLH pg 31-33 for additional information and guidelines - and additional criteria that must be considered if a potential participant has a disability.

BUS INSURANCE

Leaders and Outings Chairs must ensure that sponsored bus trips comply with the Club rules available on the national web site. Bus trip rules and the Club's insurance require that the leaders and outings chairs of sponsoring GSCs determine that the bus company being chartered has a valid certificate of insurance that names the Sierra Club as additional insured. This certificate must be sent to the national office with a copy on file in the chapter office. The leader is responsible for checking to see if the chosen bus company has a current certificate on file. If not, the leader is to secure a renewal or new certificate from the bus company. In the case of lapsed certificates or refusal to add the Sierra Club as additional insured, the bus company must not be used.

Please contact Joel Goldberg, OMC Bus Coordinator, for additional information. Also, refer to the following pages of the OLH for information on:

Buses - OLH pg 37 and
<http://clubhouse.sierraclub.org/outings/Insurance/index.asp>
 Chartered Transportation - OLH pg 47-48
 Certificate of Insurance - OLH pg 45

TRANSPORTATION

http://clubhouse.sierraclub.org/finance/risk_manual/auto.asp

Leaders cannot take an active role in making arrangements for participants' transportation. The leader supplies the directions to the trailhead, but transportation arrangements, including ridesharing, are the responsibility of the participants. Club insurance does not extend to owners,

drivers or passengers of private cars. Participants should be **advised in advance** that the Club does not assume liability for them. To avoid exposure to liability as a result of carpooling activity, Club leaders must limit their involvement in carpool arrangements to making participants aware of who needs, and who is offering rides, but they **must not** assign which cars participants ride in. Leaders can drive to and from the meeting site or outing and give rides to others, but that is strictly a private arrangement for which the Club assumes no responsibility.

At \$3.00 per gallon of gasoline and 20 mi/gal, a vehicle may cost the owner around 30¢/mile to operate (including gasoline, maintenance, and depreciation, all of which are dependent on miles driven). Riders customarily share such expenses with drivers. A suggested amount is 10¢ per mile per person. This contribution may vary with the vehicle, numbers of riders, road condition, etc. A verbal agreement between driver and riders before the carpool starts helps to avoid a later misunderstanding.

For more information on Carpooling or Leader Arranged Transportation, check page 35-37 of the OLH and go to the following web sites. Leaders should review this material before making arrangement to rent vehicles in which participants will ride.

<http://clubhouse.sierraclub.org/outings/FAQ/transportation.asp>
http://clubhouse.sierraclub.org/finance/risk_manual/auto.asp

Key Exchange

Are "key exchange" outings allowed where we meet another group and give each other our car keys?

<http://clubhouse.sierraclub.org/outings/faq/transportation.asp>

Unfortunately, key exchange outings are no longer allowed by the Sierra Club due to the inherent danger to participants and leaders from driving each other's private vehicles, and the potential implied liability of the Sierra Club.

Carpooling by Leaders

Q. Can leaders drive participants in a private vehicle during the outing (i.e., shuttling cars and participants from the campground to the trailhead, transporting youth participants from the social agency parking lot to the trailhead, etc.)?

<http://clubhouse.sierraclub.org/outings/faq/transportation.asp>

A. Leaders are discouraged from driving participants in private cars **during** the outing, such as when shuttling cars or transporting youth participants. Using rental vehicles, with full insurance coverage, is the best option. If leaders do drive participants in private vehicles during the outing, the leader's personal insurance is intended to cover any claims. Leaders should structure their outings so that participants can carpool with one another, or have rental cars or charter transportation available. The need for such private arrangement carpooling should be made clear in pre-outing communications.

LIABILITY WAIVERS

To participate on a Sierra Club outing, a person must sign a liability waiver form. Most outing use a form that is combined with a sign-in sheet. Leaders should mention that

by signing in, participants are agreeing to obey the Rules of Conduct (printed in the Chapter Schedule).

People who want to tag along without being officially signed into the trip should be discouraged by every lawful means, including signing out any participant who appears to have encouraged their presence.

Q. Can an entity modify the Sign-In Sheet?

<http://clubhouse.sierraclub.org/outings/insurance/waiverQA.asp>

A. The language at the top of the Liability Waiver cannot be modified, and the participant signature must be on the same side of the paper as the Liability Waiver language. Or, if you are using a two-sided form, the second side must have the title of the document and the reference to the liability waiver language on the first side. This latter point will avoid a situation in which a participant claims not to have seen the liability waiver language.

[National Requirement] *Your entity may modify the columns in the lower section of the form where participants write identifying information in order to gather additional or different information that may be useful on the local level. For example, instead of asking participants to note their email addresses, you may want to use that column to collect membership number. However, the "Name," "Signature," and "Early Sign Out" initial columns must always be present. Only participants who leave the outing early need to initialize the "Early Sign Out" column. Participants who stay with the group until the outing officially ends do not need to initialize this column.*

[Additional Angeles Chapter Safety Policy Requirement] A sign-in sheet must be used to sign each participant in and out and to record persons to be contacted in the event of an emergency. (To avoid adding an extra column for sign-out, some leaders use the Early Sign-Out column, adding the date and time for any early sign-out.)

[Optional] You can add other columns such as multiple sign in and sign out columns for multi-day car camp / base camp trips. Customize the form so it works best for your entity's outings. On trips that are multiple day car camps or base camp trips or similar, leaders should know who is participating in organized club activities each day. Customizing the form with a sign-in and sign out column for each day of the trip can help keep track of who is with the group, who has gone home, or is otherwise not a part of the official outing for the day.

Check the Clubhouse [Policy and FAQs references](#) for additional information or go to the [LTC web site](#), the [Chapter Outings web site](#), or the following URL for alternate forms such as the individual waiver form or the form for mountaineering restricted trips:
<http://clubhouse.sierraclub.org/outings/gco/forms.asp>

Q. When and where should participants sign the Liability Waiver and Acknowledgement of Risk form?

<http://clubhouse.sierraclub.org/outings/insurance/waiver.asp>

A. As early as possible. Leaders must ensure that all participants have ample time to read the Liability Waiver, as

well as an opportunity to back out on the outing if they decide they do not feel comfortable signing the Liability Waiver. If they have carpooled and first see the waiver at the trailhead, they don't have much choice.

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. This also provides the leader with an opportunity to reiterate that carpools are not covered by the Club's insurance, and that any carpool arrangements are at the risk of the driver and passengers.

Make this clear to all that the Sierra Club is not responsible for their transport to the start of the hike, during car shuttles during the day, or after the hike, and the Sierra Club trip starts - and ends - at the trailhead(s). Everyone is on his or her own until the hike starts.

For trips requiring advanced reservation, send out a copy of the liability waiver text (or a reference to where it can be found) so that people can read it and determine that they are in agreement before a cancellation / refund period.

For outings that require participants to fill out paperwork prior to the departure date (such as some Inner City Outings, multi-day outings, and international outings), the Individual Liability Waiver should be included with that paperwork. In this case, a signed Liability Waiver should be collected from each participant prior to the outing start date.

Acknowledgement of Risk Form

Q. What is the difference between a liability waiver and an acknowledgement of risk form?

<http://clubhouse.sierraclub.org/outings/insurance/waiverQA.asp>

A. A participant's acknowledgement of risk is just that -- an acknowledgment that the participant might get hurt. A liability waiver includes such an acknowledgement, but it goes beyond mere acknowledgement of risk and also asks the participants to assume the responsibility for that risk.

Which Form?

Q. How will I know whether to use the Liability Waiver or the Acknowledgement of Risk Form on my outing?

<http://clubhouse.sierraclub.org/outings/insurance/waiverQA.asp>

A. Use the Liability Waiver unless a land use permit explicitly prohibits the use of liability waivers.

Signing the Liability Waiver

Q. Who should sign the Liability Waiver and Acknowledgement of Risk form?

<http://clubhouse.sierraclub.org/outings/insurance/waiverQA.asp>

A. All adult participants or a minor's parent/legal guardian must sign the waiver before the outing begins. Leaders are NOT required to sign the Liability Waiver.

Do the trip leaders sign the waiver? [National answer] The listed trip leaders do not need to waive their rights, they are agents of the Club acting on the Club's behalf and are covered by the Club's liability policy when acting as the listed leaders. Leaders can just fill in the top part of the sheet,

or can add their names at the sign in part of the sheet, but need not sign the waiver¹. Putting the leaders names on the list may make getting a head count easier, so some may prefer to do that but not have the leaders sign the waiver line. Any other rated leaders who happen to be on the trip as participants must sign the waiver like any other participant. WTC has non-rated instructors in the groups who assist. They must always sign the waiver.

¹ [OMC comment] The Angeles Chapter has not taken a position on the above national answer. A leader who does not sign the waiver may have the right to sue the other leader(s) or participants. Some entities (e.g., WTC) may have specific policies on leaders signing waivers.

Q. What do I do if someone refuses to sign the Liability Waiver at the trailhead?

A. This is obviously a difficult situation, but a person who does not sign the Liability Waiver cannot be allowed on the outing. Remind the person that the requirement to sign the Liability Waiver was mentioned in the outings publicity materials. Avoid the problem by having them sign prior to the outing.

Q. What do I say when a participant tells me that liability waivers are not "worth the paper they are printed on?"

<http://clubhouse.sierraclub.org/outings/insurance/waiverQA.asp>

A. You must not allow participants to be left with the impression that the waiver has no meaning. Simply state that the Club believes that liability waivers are enforceable. It is not in either the leader's or the Club's interests to downplay the importance of the liability waiver.

[OMC comment] In actual fact, waivers make it harder for the plaintiff in a lawsuit. The waiver works for simple negligence; plaintiffs must show gross negligence to override the waiver.

Minors

Q. Can minors sign Liability Waivers or Acknowledgement of Risk forms?

A. A minor (anyone under 18) must have the Liability Waiver signed by his or her parent or legal guardian.

Q. Can an unaccompanied minor come on my outing and if so, what do I need to do?

A. Yes, an unaccompanied minor may attend an outing as long as the parents or legal guardian sign the Liability Waiver AND a Minor Medical Treatment Authorization.

NOTE - National approval is required only if primary focus of the outing is to youth under the age of 18.

Outings Co-Sponsored by a Non-Club Organization

<http://clubhouse.sierraclub.org/outings/insurance/waiver.asp>

Q. My entity runs official outings in conjunction with another (non-Club) organization – or concessionaire. Do the members of the other organization on the outing need to sign the Club's Liability Waiver?

A. Yes, as the Club is responsible for the conduct of the outing – even if the other organization also requires participants to sign a different waiver. (Such co-led trips probably require national approval.)

Temporary Sign-Out

Q. Can a participant temporarily sign out and later sign back in to the same outing?

NO! Once signed out, a person may not sign back into an outing. All participants and leaders should plan to start an outing together, stay together throughout the outing, and return to the end together. Those unwilling to do this should not be a participant on the outing. If a person wants to hike faster or slower than the group or to split off from the group to climb a peak not part of the trip objective, that person should not sign up to participate on the group outing. If some participants insist on leaving to do their own thing, they should not be allowed to participate on future outings unless they agree to abide by the outing plan and leaders' directions.

Leaders of multi-day outings should review FAQs - Free Days at http://clubhouse.sierraclub.org/outings/faq/free_days.asp

In some cases, leaders may allow participants to sign out early when, in the leaders' judgment, it is safe to do so. However, leaders should recognize that this weakens the remaining group and decreases available options in case of an emergency. It may also encourage others to want to go along with someone who is not competent to lead, which could have disastrous results should an accident occur.

Storing Liability Waiver Forms

Q. What should a leader do with Liability Waiver/Sign-In Sheets after an outing?

[Angeles Chapter] The forms are to be sent to your entity Outings Chair following the outing. For co-sponsored trips, send the original to the primary sponsor and a copy to other sponsors. If you are required to send the original to San Francisco (e.g., for restricted trips or if an Incident Report form is submitted), then send a legible copy to the outings chair with a note added to indicate the location of the original forms. Leaders should also keep a copy for 7 years.

Enduring Waivers

Q. The Griffith Parks Section has approval to use an "Enduring Waiver" on their evening conditioning hikes. Participants sign once only rather than re-sign at the beginning of each outing. Does any other entity have approval for such a system?

A - No! The "Enduring Waiver" system was approved for the Griffith Parks Section repeating evening hikes only. No other entity has a waiver of the requirement to have participants sign a liability waiver before the beginning of each outing.

All other entities and leaders must ensure that all participants sign a liability waiver form prior to the beginning of each outing.

CANCELLING TRIPS

http://clubhouse.sierraclub.org/outings/policy/outing_definition.asp

All Club-sponsored outings require at least one participant in addition to the planned leaders. If there are no participants and only the outing’s designated leaders are present, the outing is considered cancelled. If the leaders decide to go on the hike anyway, the hike is not a Sierra Club outing.

In the event that a scheduled outing has to be canceled because two appropriately rated leaders are not available, the following rules apply.

1. If the outing is canceled at the “trailhead,” the leaders may not lead the outing as a private trip. A different trip that is acceptable under the limitations of the available leaders may be led as a Club outing if two leaders rated appropriately for the new destination are available among the participants and leaders present.
2. If an outing with advanced sign-ups is canceled prior to the date of the outing and all prospective participants are notified prior to leaving for the trip, the outing may be led as a private trip. Phone or verbal communication is sufficient, but a written (or e-mail) record of the change must be sent to the sponsoring outings chair(s). It is recommended that a copy also be sent to the Safety Committee Chair.
3. Trips without advanced sign-ups (...just show up at the trailhead) cannot be converted to private trips as there is no way to satisfy the Club requirement that ALL prospective participants be notified prior to leaving for the trip.
4. If a trip cannot be conducted when scheduled for lack of leaders or for other reasons, the trip can be re-scheduled for a later date (near term) without re-publication provided a written (or e-mail) record of the change is sent to the sponsoring outings chair(s). It is recommended that a copy also be sent to the Safety Committee Chair. The re-scheduled trip should be published if it is possible to do so.

INCIDENT REPORT FORM

What accidents or incidents to report? Please review the Instruction Sheet, page 1 of the Chapter version of the Incident Report Form, available at the [LTC web site](#). Leaders should be familiar with the guidelines listed on the Instruction Sheet.

Make a report as soon as possible after returning from the outing. This is particularly critical if the accident is severe, involves outside parties during evacuation or presents a potential basis for litigation. If you lack some information such as a definitive injury description, file a preliminary report and supplement it later. Leaders must call in serious injuries immediately. [See OLH pg 42.]

The Incident Report Form is periodically revised to reflect changes in Club Policy or insurance requirements. However, some reports are still coming in using forms that were replaced several years ago. The older forms must be discarded. Only the latest form should be used.

The leader should send the original signed copy of the Incident Report Form to the National Office along with the original of the Sign-In Sheet and Liability Waiver. Other copies (of both forms) are to be sent per the Chapter version of the Instruction Sheet (Page 1 of the Form). Note that the

latest revision of the instruction sheet indicates that the Safety Committee copy is to be sent directly to Ron Campbell rather than the Safety Chair.

Life-threatening incidents/emergencies/fatalities that require rescue or evacuation should be reported immediately by telephone to the Sierra Club Outings Department at **1-888-OUTINGS** (888-688-4647) or 01-715-852-1701 if calling internationally.

ANGELES CHAPTER SPECIFIC POLICIES

Organizational Structure:

1. An Outings Management Committee (OMC) performs oversight over all Chapter outings. The OMC Chair is the Chapter Outings Chair.
2. A Leadership Training Committee (LTC) trains new leaders in a Leadership Training Program (LTP). The LTP lectures cover OLT 101 and OLT 201 material.
3. A Safety Committee performs leader certification for all Chapter entities, approves entity safety policies, reviews outings write-ups in Chapter publications, and conducts accident/incident investigation. Any requests for waiver of leader requirements are to be addressed to the Safety Committee Chair.
4. A Wilderness Training Committee (WTC) provides training for trip participants.

Outings/Leader Ratings and Requirements:

1. Chapter outings — and leaders — are rated O/I/M/E (as defined in the Chapter Schedule). Leaders must have an appropriate rating to lead an outing.
2. The Chapter Safety Policy (available on the LTC web site) provides procedures for use on O-level outings.
3. All Chapter entities sponsoring I/M/E/T outings have an approved Safety Policy that provide procedures for use on such outings. Leaders must be familiar with - and follow the approved procedures.
4. All Chapter outings require two leaders (generally one leader and one assistant) unless the Safety Committee has approved an exception. (Some specific repeating evening hikes have been approved to split into sub-groups with only one leader per sub-group.)
5. Both leader and assistant must meet the LSP first aid requirement.
6. For co-sponsored outings, a leader must submit trip writeups to the Outings Chairs of all the co-sponsors.
7. The Chapter Safety Policy requires publication of outings to document that an outing has been approved by the sponsoring entity.
8. There is a tailored Incident Report form for use with Chapter outings. The national form has been tailored to accommodate Chapter reporting requirements for the various Chapter organizations. Refer to the Instruction Sheet of the Chapter version of the form for distribution requirements.

9. Prescription Medicine On Outings - Chapter leaders are NOT authorized to carry either an EpiPen or other prescription medicines on Chapter outings except for their own personal use. Leaders should repeatedly and clearly notify trip participants in pre-outing communications of the need to carry their own regular prescription medications.

The Angeles Chapter OMC has voted to NOT adopt the Club policy on carrying prescription medicine on outings.

Therefore, the material on prescription medicine at the following URL and on pg 27-29 in the national Outings Leader Handbook (OLH) do not apply to Chapter outings.
<http://clubhouse.sierraclub.org/outings/policy/FirstAid/prescription.asp>

OTHER REFERENCES

1. Certificate of Insurance - See OLH pg 45; also go to <http://clubhouse.sierraclub.org/outings/insurance/certificateFAQ.asp> for more information: (1) if a property owner asks for a Certificate of Insurance or (2) if an outing will use a concessionaire. If using a concessionaire, also go to: <http://clubhouse.sierraclub.org/outings/national/faq/thirdparty.asp> and check OLH pg35-37.

2. Leader-Owned Cabins and Equipment

<http://clubhouse.sierraclub.org/outings/policy/Guidelines/index.asp>

3. Index to National Outings Policies and Guidelines

<http://clubhouse.sierraclub.org/outings/policy/>

4. Index to National FAQs (Questions and Answers)

<http://clubhouse.sierraclub.org/outings/faq/>

Angeles Chapter Leader List (1/1/2008)

Outings Chairs should check the on-line Leader List at www.angeles.sierraclub.org/leaders for the latest information. If you are an Outings Chair and do not know the password, contact Lori Ives or the Safety Chair. The on-line Leader List also provides the following additional information:

- 1. Main ID No. (Sierra Club Membership No.)**
- 2. Individual ID No. (Sierra Club Membership No.)**
- 3. Chapter and Regional Group**
- 4. Lead Date and Lead Type (currently not used)**

The home page describes leader categories; the list indicates membership, first aid, and OLT 101 policy update status of leaders. Outings Chairs have access to this list.

Attachment 5 - Inactive/Retired Leaders

Hansen, Helen	O	Lattanzio, Robert	O	Miller, Lynne	O	Rosenthal, Murray	O	Stilson, April	O	Zwanenburg, Leen	O
Hansen, Helen	O	Lee, Donna	O	Millman, Ron	O	Roth, Lee	O	# Stirratt, Betty	O	Murray, Ken	PO
Harp, Judith	O	Lee, Karen	O	Mlyniec, Natalie	O	Rothkrug, Steve	O	Stockemer, Angela	O		
Harris, Bill	O	Lee, Larry	O	Mohr, Jim	O	Rubyn, Ana	O	Stoney, Beverly	O		
Harter, Richard	O	# Leichter, Maxine	O	Moloian, Edward	O	Russell, Bill	O	Streeter, Pam	O		
Harwood, Gwen	O	# Leichter, Steven	O	Moorhead, Bee	O	Ryan, Cynthia	O	Sturrock, Daphne	O		
Harwood, Robert	O	Levee, Arnold	O	Morel, Barbara	O	# Sale, Terri	O	Sussman, Marian	O		
# Headly, Jackie	O	Levee, Linda	O	Morey, Don	O	Saletore, Pat	O	Sutherland, Harry	O		
Hecht, Calvin	O	Levy, Merri	O	# Morgan, Cynthia	O	# Sambor, Helen	O	Swanson, Nolan	O		
Heenan, David	O	Lewis, Jane	O	Morgan, William	O	Sand, Julie	O	Tait, David	O		
# Helbrecht, Mitch	O	# Liebman, Sandy	O	Morgenstern, Mary	O	Sattler, Al	O	# Tapia, Al	O		
Helpfrey, Dave	O	Linehan, Eloda	O	Morin, Y Denise	O	Saurer, Christa	O	Tatz, Martin	O		
Henderson, Donald	O	Lioio, Rick	O	# Morrow, Jack	O	Schadel, Steffi	O	Thompson, Inger	O		
Henderson, Glen	O	Longmore-Grund, Rhonda	O	Muellner, Ida	O	Scharenberg, George	O	Thompson, Teresa	O		
Hendricks, Mary	O	Lovelady, Melissa	O	Mullen, Philip	O	Schatteles, Sheila	O	Timmons, Iris	O		
Hicks, Katie	O	Lower, Mary	O	Munsey, Debbie	O	Schipper, Joan	O	# Titterington, Patrice	O		
# Hiestand, Bob	O	Lu, K U Thomas	O	# Murphy, Daniel	O	Schneider, Allan	O	Tolin, Norma	O		
Hill, Douglas	O	Lubeshkoff, Jeannine	O	Murphy, Patrick	O	Schneider, Allyn	O	Tomikawa, Brian	O		
# Hill, Jackline	O	Ludwig, Tom	O	Murray, Doug	O	Schneider, Kirk	O	Tomikawa, Victoria	O		
# Hingson, Dick	O	# Lulofs, Ed	O	Murray, Ken	O	Schneier, Neal	O	Tomovich, Nick	O		
# Hirschmann, Franz	O	Lum, Donald	O	Neely, Tom	O	Schreiber, Tom	O	Trautwein, Mary Beth	O		
Hochhausler, Ingeborg	O	Lund, Chris	O	# Nichols, Marian	O	Schure, Denis	O	Trautwein, Paul	O		
Hodel-Wong, Carol	O	Lynn, Eleanor	O	Noonan, Mary	O	Scow, Jan	O	Tries, Renate	O		
Holzman, Barry	O	Lynne, Carmen	O	Norton, Tom	O	Seldon, Mervyn	O	Trommer, Jack	O		
Huebscher, Fred	O	# Macgregor, Donald	O	Novobilski, Beatrice	O	Selzer, Alice	O	# Tseng, Alice S	O		
Hughes-Getz, Carol	O	Mack, Arthur	O	OBrien, Kevin	O	# Shaffer, Paul	O	Tunick, Eileen	O		
Intagliata, Paul	O	# Mader, Al	O	Osullivan, Bridget	O	# Sheehan, David	O	Turner, Ralph	O		
# Jacobowitz, Deborah	O	Mader, Rich	O	Otten, Lyle	O	Shiraishi, Lori	O	Urquidi, Ronald	O		
Jacobs, Edythe	O	Mahdessian, Femma	O	Palmer, Sue	O	Siebert, Tom	O	Vallens, Don	O		
Jensen, Muffit	O	Manahedgi, Bahram	O	Parravicini, Mireya	O	Sieke, Eric	O	# Van de Houten, John	O		
Jensen, Verlyn	O	Margerum, John	O	Paulin, Gene	O	Siemons, Donald	O	Van Dyke, Bryan	O		
Johnson, Gregory	O	Marx, Steve	O	Pavon, Ben	O	Simms, Melba	O	Van Dyke, Marilyn	O		
Johnson, Richard	O	Massoud, Roger	O	Payette, Marilyn	O	Simms, Willis	O	Van Natter, Carlos	O		
Jones, Lucy	O	Matloff, Marc	O	Pennington, Ella	O	Simonetti, Richard	O	Van Oppen, Marilyn	O		
# Jones, Susan	O	# Matsumori, Neil	O	# Peterson, Donald	O	Singh, Valerie	O	# Van Orman, Cathy	O		
Jura, Joe	O	Matsunaga, Geoffrey	O	Peterson, Jim	O	Skelley, John	O	Van Rijn, Riky	O		
Kaeser, Nan	O	Matthews, John Williams	O	Pfeffer, Ping	O	Skinner, Virginia	O	Van Tol, Michelle	O		
Kanigher, Talbert	O	Maurer, Annette	O	Pfeiffer, Erich	O	Stocum, Margot	O	Vanderberg, Bill	O		
Katzen, Barry	O	Maxey, Darlene	O	Pick, Charlotte	O	Slottow, Jeffrey	O	# Vester, Milt	O		
Kaye, Jerry	O	Maxey, William	O	Piper, Lois	O	Slottow, Joan	O	Vivian, Larry	O		
# Keedy, Avis	O	# Maxfield, Rosemary	O	Politeo, Tom	O	Slusher, Nancy	O	Vollmer, Jim	O		
Keistler, Brad	O	Maxwell, Evelyn	O	# Presser, Phil	O	Smith, Esther	O	Walker, Willie	O		
Keller, Jean	O	Mazmanian, Lucie	O	Prismon, Mary	O	# Smith, Fred	O	Ward, Donald	O		
Kendrick, Juliet	O	Mccallum, Norman	O	Proffit, J	O	# Smith, Jerri	O	Ward, Monalisa	O		
Kennedy, Patricia	O	McCully, Carol	O	Puff, Robert	O	# Smith, Karen	O	Waugh, Brenda	O		
Kettering, Alice	O	McDonald, Duncan	O	Raasch, Karen	O	Smith, Teri	O	# Weil, Susanne	O		
# Kiely, Mary Ann	O	McFarlan, Jim	O	Ramirez, Samuel	O	Snyder, Donald	O	Wells, John	O		
# Kincaid, Jo An	O	McIntyre, John	O	Randall, Victoria	O	Snyder, Phyllis	O	West, Ellie	O		
Kitamura, Mariko	O	Mckean, John	O	Rao, Koganti	O	Solko, Tammy	O	Wexler, Leonard	O		
Klementis, Nary	O	McMahon, Liz	O	Rathje, Paul	O	# Soost, Elaine	O	Whan, Adelaide	O		
Kliszewski, Adam	O	Memmel, Anita	O	Reeb, Jeff	O	Sorrenti, Nancy	O	Whitcomb, Richard	O		
# Kniepkamp, Dick	O	Mencken, Raymond	O	Remy, Larry	O	# Soucy, Ray	O	Wida, Martha	O		
# Kobayashi, Joy	O	Menendez, Val	O	Rhone-Popper, Elizabeth	O	Southam, Agnes	O	Wilhelm, Lindsay N	O		
# Kocher, Ruth	O	Menkes, D	O	Riekes, Julie	O	Spatz, Barbara	O	Williams, Alan	O		
Kolodny, Howard	O	Merica, Peggy	O	Riva, Carl	O	# Spreng, Bill	O	Williams, Jeanne	O		
Krantz, Betty	O	Merrilees, Jeannette	O	Rivard, Lee	O	Spriggs Brodie, Mary	O	Wilson, O	O		
Kunsmann, Karin	O	Metcalfe, Vieve	O	Roberts, Elizabeth	O	Standke, Gary	O	# Woelfel, Dave	O		
Kuo, Jenny	O	Metz, Elaine	O	Robinson, Bonnie	O	Standke, Nita	O	Wolfe, Ray	O		
Kurtzwell, Darlene	O	Michels, David	O	Roche, Linda	O	Stark, Milt	O	Yamada, Bruce	O		
Kutcher, Celia	O	Michels, Suzanne	O	Rogers, Don	O	# Starr, Rhonda	O	Yang, Kimberly	O		
Ladd, Harry	O	# Miller, Allen	O	Rogers, Douglas	O	Stein, Andrea	O	Yann, Jeff	O		
Lainer, Maxim	O	Miller, Carol	O	Rogowski, Kate	O	Stein, Norman	O	Yatrofsky, Andrew	O		
Laing, Barbara	O	# Miller, Ellen	O	Rosay, Rosalina	O	Steinhauer, Lou	O	Young, Robert	O		
Landau, Linda	O	Miller, Jack	O	Rosenthal, Howard	O	Stewart, Anne	O	Zeider, Steve	O		
# Lange, Betty	O	Miller, John	O	Rosenthal, Leslie	O	Stewart, Jane	O	Zemer, Ann	O		

Outing:	Date(s):	Page of
Leader:	Assistant Leader:	

Sign-In Sheet & Acknowledgment of Outing Member Responsibility, Express Assumption of Risk, and Release of Liability

I understand that during my participation in this Sierra Club Outing, I may be exposed to a variety of hazards and risks, foreseen or unforeseen, which are inherent in each Outing and cannot be eliminated without destroying the unique character of the Outing. These inherent risks include, but are not limited to, the dangers of serious personal injury, property damage, and death (“Injuries and Damages”) from exposure to the hazards of travel and the Sierra Club has not tried to contradict or minimize my understanding of these risks. I know that Injuries and Damages can occur by natural causes or activities of other persons, animals, trip members, trip leaders and assistants or third parties, either as a result of negligence or because of other reasons. I understand that risks of such Injuries and Damages are involved in adventure travel such as Sierra Club Outings and I appreciate that I may have to exercise extra care for my own person and for others around me in the face of such hazards. I further understand that on this Outing there may not be rescue or medical facilities or expertise necessary to deal with the Injuries and Damages to which I may be exposed.

In consideration for my acceptance as a participant on this Outing, and the services and amenities to be provided by the Sierra Club in connection with the Outing, I confirm my understanding that:

- I have read any rules and conditions applicable to the Outing made available to me; I will pay any costs and fees for the Outing; and I acknowledge my participation is at the discretion of the leader.
- The Outing officially begins and ends at the location(s) designated by the Sierra Club. The Outing does not include carpooling, transportation, or transit to and from the Outing, and I am personally responsible for all risks associated with this travel. This does not apply to transportation provided by the Sierra Club during the Outing.
- If I decide to leave early and not to complete the Outing as planned, I assume all risks inherent in my decision to leave and waive all liability against the Sierra Club arising from that decision. Likewise, if the leader has concluded the Outing, and I decide to go forward without the leader, I assume all risks inherent in my decision to go forward and waive all liability against the Sierra Club arising from that decision.
- This Agreement is intended to be as broad and inclusive as is permitted by law. If any provision or any part of any provision of this Agreement is held to be invalid or legally unenforceable for any reason, the remainder of this Agreement shall not be affected thereby and shall remain valid and fully enforceable.
- To the fullest extent allowed by law, I agree to **WAIVE, DISCHARGE CLAIMS, AND RELEASE FROM LIABILITY** the Sierra Club, its officers, directors, employees, agents, and leaders from **any and all liability** on account of, or in any way resulting from Injuries and Damages, even if caused by **negligence** of the Sierra Club its officers, directors, employees, agents, and leaders, in any way connected with this Outing. I further agree to **HOLD HARMLESS** the Sierra Club, its officers, directors, employees, agents, and leaders from any claims, damages, injuries or losses caused by my own negligence while a participant on the outing. I understand and intend that this assumption of risk and release is binding upon my heirs, executors, administrators and assigns, and includes any minors accompanying me on the Outing.
- I have read this document in its entirety and I freely and voluntarily assume all risks of such Injuries and Damages and notwithstanding such risks, I agree to participate in the Outing.

Name	Signature	Address	Home Phone	Emergency #	Car License	Early Sign-Out
				Name/Relation		

I have read the attached **Sign-In Sheet & Acknowledgment of Outing Member Responsibility, Express Assumption of Risk, and Release of Liability** in its entirety and I freely and voluntarily assume all risks of such Injuries and Damages and notwithstanding such risks, I agree to participate in the Outing.



SIERRA CLUB OUTINGS

Medical Treatment Authorization and Consent Form

I, the parent or guardian of:

1) _____ (minor child name)

2) _____ (minor child name)

3) _____ (minor child name)

authorize _____ (accompanying adult name or trip leader name) to:

- arrange or provide medical treatment for the minor(s), including but not limited to helicopter evacuation, ambulance service, medications, first aid, hospitalization, and surgery;
- execute any forms, consents, and releases as may be useful under the circumstances; and
- delegate the authority granted herein to any other person(s).

I understand that efforts will be made to contact me if medical treatment should be needed. I will ensure that the minor will bring any necessary medications on the trip.

Parent or Guardian Name (print)

Signature

Date

Trip Name

Trip Leader Name

Trip Dates



SIERRA CLUB OUTINGS

85 Second Street, Second Floor
San Francisco, CA 94105
Phone: 415-977-5522
Fax: 415-977-5795
outings.sierraclub.org

Angeles Chapter - Sierra Club Incident Report Instructions

Trip leaders are responsible for reporting all incidents and illnesses **immediately** after the outing using this Incident Report Form. Failure to report incidents may jeopardize the leader and the Club. During the time of the incident, use the Patient Report or similar medical field assessment form. You can download both the Incident Report and Patient Report from the following extranet site: <http://clubhouse.sierraclub.org/outings/forms.asp>

NOTE: This form tailored for Angeles Chapter. Form at above URL may be used for Chapter activities if the instructions below are followed.

An Incident Report must be filed for:

- Any incident that requires search, rescue or evacuation.
- Any injury that requires advanced first aid.
- Any injury or illness that could have future complications or require medical attention after the outing (i.e. animal bite, severe sprain).
- Any act of suspected sexual harassment or child abuse.
- Any act that violates the law.
- Additional Angeles Chapter requirement – [Reports for these additional requirements need not be faxed or sent to National unless requested by Chapter Safety Committee] – Any other incidents involving lost person(s), altitude sickness, hypothermia, problem participant, etc., or reoccurrence of prior condition that requires an emergency response or compromise of the outings objective for all or some participants.

An Incident Report does not need to be filed for:

- Minor injuries such as scratches and blisters.
- Other personal illnesses that will not likely have future complications even if the illness causes the person to leave the trip.

Please fax and mail in the original Incident Report including the following items:

- Sign-in sheet or Participant list
- Original Liability Waiver
- Participant Medical Form and/or Patient Report, if applicable

Please send your report to:

Fax reports to: (415) 977-5795

After faxing, mail reports to:

Sierra Club Outings
85 Second Street, 2nd Floor
San Francisco, CA 94105

For Angeles Chapter activities, also mail copy of above to: (1) Sierra Club-Angeles Chapter Office, 3435 Wilshire Blvd, Los Angeles, CA 90010-1904, (2) Ron Campbell, Angeles Chapter Safety Committee, and (3) the Chair and (4) the Outings Chair of sponsoring Groups, Sections, and Committees.

Life-threatening incidents/emergencies/fatalities that require rescue or evacuation should be reported immediately by telephone to the Sierra Club Outings Department at:

1-888-OUTINGS (888-688-4647)

or 01-715-852-1701 if calling internationally

This revised Incident report replaces the three-page, carbon copy version. **Please discard any old Incident Reports (formerly known as Sierra Club Accident and Illness Report) and distribute this form to all of your Outings Leaders and administrative offices.**

Sierra Club Incident Report Form – Angeles Chapter

Include the participant's waiver and medical form with this report.

Person making report		Date	
Address		Phone	

Local Outings Entity (Group/Section/Committee) Name:	
or Inner City Outing (ICO) Group:	
Date & Name of Outing	

Leader Name:	
---------------------	--

Copy of report sent to:	Name/Address/Phone No.
Sierra Club-Angeles Chapter Office	3435 Wilshire Blvd #320, Los Angeles, CA 90010-1904, 213-387-4287
Chapter Safety Committee	Ron Campbell, 21432 Dockside Cir, Huntington Beach, CA 92646-7218
Entity (G/S/C) Chair	
Entity (G/S/C) Outings Chair	

Identity of ill, injured, or affected person:		Age (check one):		<input type="checkbox"/> 30 - 39	<input type="checkbox"/> 60 - 69
Name:	_____	<input type="checkbox"/> Under 19	<input type="checkbox"/> 40 - 49	<input type="checkbox"/> 70 - 79	
Address:	_____	<input type="checkbox"/> 20 - 29	<input type="checkbox"/> 50-59	<input type="checkbox"/> 80 +	
Phone:	() _____	<input type="checkbox"/> Female	<input type="checkbox"/> Male	Height: _____	Weight _____
		Sierra Club member? <input type="checkbox"/> Yes <input type="checkbox"/> No			

Family of injured contacted? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, by whom? _____	
Family contact:	Relationship: _____
Address:	Phone: () _____

Public agencies contacted regarding this incident:	
Date: _____ / _____ / _____ am pm	Agency: _____
Location: _____	Contact: _____
By: _____	Phone: () _____

Evacuation / Search & Rescue The incident required:
 Immediate evacuation Assistance (search & rescue) Neither Continued outing Ended outing early

Names of all other witnesses or persons involved in the evacuation or search and rescue:		
Name:	Address:	Phone:
_____	_____	() _____
_____	_____	() _____
_____	_____	() _____
_____	_____	() _____

Incident Details	
Date of Incident: __/__/__ Time __:__ am pm	Weather Conditions:
Location:	
Brief factual description of injury or illness:	First aid provided (including any medication):
	By whom:
Provide full description of the incident including preceding events and conditions, and all measures taken after the incident. Do not state any opinions regarding the cause (use additional sheets if necessary).	
Activity participant was doing when incident occurred <input type="checkbox"/> Car Camping <input type="checkbox"/> In camp <input type="checkbox"/> River activity: <input type="checkbox"/> Sledding <input type="checkbox"/> Cycling <input type="checkbox"/> International trip kayak raft canoe <input type="checkbox"/> Service Trip <input type="checkbox"/> Hiking <input type="checkbox"/> Kayaking: sea lake <input type="checkbox"/> Skiing: x-country alpine <input type="checkbox"/> Swimming <input type="checkbox"/> Hiking with pack <input type="checkbox"/> Mountaineering <input type="checkbox"/> Other:	

I have supplied the confidential information requested above for the Sierra Club, its insurance company, and its attorneys.

Signed _____

Date _____

Fax Report to: (415) 977-5795

Mail original Sierra Club Outings
Report, medical forms 85 Second Street, 2nd Floor
& participant waiver San Francisco, CA 94105
to:

This report is intended to be confidential for transmission to and use by Sierra Club attorneys for litigation arising out of claims.

Emergency Response – Patient Report

Include several copies of this form in your first aid kit

Patient Name		Sex	Age	Weight	Height	Date	Time
		M F					
Consent to treat? Y N	Mechanism of Injury	Chief Complaint					
Cleared-Spine? Y N							

S T O P	LIFE THREATENING CONDITIONS (A B C D E) <u>Airway Breathing Circulation/Severe Bleeding</u> <u>Disability (c-spine) Environment (cold/heat) Shock</u>	T R E A T
----------------------------	--	----------------------------------

P A T I E N T H I S T O R Y	<u>Allergies (medications, food, stings)</u>	V I T A L S I G N S	NOTE: See Back for Continuing Monitoring			
	<u>Medications (dose, frequency)</u>		Time			
	<u>Past Injury/Illness</u>		Pulse			
	<u>Last Oral Intake</u>		Respiratory Rate/Quality			
	<u>Events Leading to Incident</u>		Skin	W P D	W P D	W P D
			Pupils (PERRL)	E R R L	E R R L	E R R L
			Mental Status	Alert x ___ V P U	Alert x ___ V P U	Alert x ___ V P U
			<u>Skin</u> – Is it W arm, P ink and D ry? <u>Pupils</u> – Are the E qual, R ound, and R eactive to L ight? <u>Mental Status</u> – Does patient know the 4 questions? 1. Who they are? 3. What Happened? 2. Where they are? 4. What time/day is it? If patient is not Alert X 4 , does he/she respond to Verbal command or Pain ? If not, then patient is Unconscious.			

Results of Head-to-Toe Exam:

Spinal Assessment:

Release Spinal Precautions Neurological Exam Range of Motion Test

Summary of Assessment:

Treatment Plan:

Stabilize Cervical Spine Prevent Heat Loss Cool (if appropriate)
 Treat for Shock Circulation/Sensation/Motion Check

Specific Treatments:

Vital Signs & Continued Care (Minimum Information Necessary, add as needed)

Time							
Pulse							
Respiratory Rate/Quality							
Skin	W P D	W P D	W P D	W P D	W P D	W P D	W P D
Pupils (PERRL)	E R R L	E R R L	E R R L	E R R L	E R R L	E R R L	E R R L
Mental Status	Alert x ___ V P U ___	Alert x ___ V P U ___	Alert x ___ V P U ___	Alert x ___ V P U ___	Alert x ___ V P U ___	Alert x ___ V P U ___	Alert x ___ V P U ___
Heat/Cool							
Treatment Site							

Evacuation Plan

<u>Exact Location of Patient</u> ___ <i>Marked Map Attached</i>		<u>Helicopter Site</u> (100' X 100' Clear)
<u>Resources on Site</u> (tents, bags, food, water, technical equipment, etc.)	<u>Messengers to notify</u> Rescue Agency: _____ _____	<u>Terrain</u> <u>Distance to Roadhead:</u>
	Phone #: _____	
<u>Personnel on Site</u>	<u>Communication Equipment on Site?</u> Cell Phone# Do you have reception at the site? 2 Way Radio? ___ Type: freq/channel:	<u>Current Weather</u>
<u>Assistance Needed</u> ___ Medical ___ Helicopter ___ Carry-out ___ Search ___ Backboard ___ Technical Evacuation: Raise or Lower ___ Other:		
<u>Patient's Family Member</u> ___ Please contact		
_____	_____	_____
Name	Address	Phone
		Relation

Message

For life threatening emergencies or fatalities contact the Outings Department as soon as possible at: 1-888-OUTINGS (1-888-688-4647) or 01-715-852-1701 if calling internationally. Also send an incident report form to the Outings Dept. Following the incident.

SAMPLE FORM

Safety Management/Emergency Response Plan

Using this form: This form will help you capture information *before* beginning your outing. It is generic – make adjustments as needed. Leave a copy with your Outings Chair before the outing begins.

Key Information

<u>Trip name</u>		<u>Start date</u>		<u>End date</u>		<u>Total # of days</u>	
<u>Primary outdoor activity</u>		<u>Number of leaders</u>			<u>Number of participants</u>		
		Total:	M:	F:	Total:	M:	F:
<u>Leader roles</u>	<u>Leader names</u>		Entry location and time:				
1.	1.						
2.	2.						
3.	3.						
			Exit location and time:				
For Entry & Exit - give enough detail to locate on a map – such as map quad name, nearest road, name of trailhead. Use approximate times.							

Land Use and Agency

<u>Commonly used location name</u> (e.g., Ventana Wilderness)	<u>Agency who manages this area</u> (e.g., United States Forest Service)	<u>Agency contact person</u>	<u>Agency location</u>
<u>Agency phone</u>		<u>Hours</u>	<u>Ranger station or outpost facility information</u>

Medical Facilities

	<u>Medical facility #1</u>		<u>Medical facility #2</u>	
<u>Name</u>				
<u>Address</u>				
<u>Phone</u>		<u>Hours</u>		<u>Hours</u>
<u>Services</u>				

Additional Emergency Contacts

	<u>Sheriff</u>	<u>Police</u>	<u>EMS or fire department</u>
<u>Name</u>			
<u>Address</u>			
<u>Phone</u>			

SAMPLE FORM

Itinerary

Day #	Date	Day	Route: <i>Include intended campsites and alternates, mileage, off-trail or on-trail, Direction of travel, known hazards, map names, trail names, and landmarks.</i>
			Evacuation: <i>Include distance and type of help available (roadhead, ranger station, etc.)</i>
1			
2			
3			
4			
5			
6			
7			
8			

Safety Management Checklist (all must be completed/packed before outing departs)

- Does the proposed itinerary **identify potential dangers** and **expected countermeasures**?
- Participant roster** (or Sign-in Sheet and Liability Waiver)*
- Signed liability waivers for each participant** (or one Sign-in Sheet and Liability Waiver signed by all)
- Two sets of Participant Medical Forms** (One set for leaders and a copy with each participant. Leaders should fill these out too. Form should include emergency contact information.)
- Copy of Safety Management Plan** left with a designated contact person (e.g., Outings Chair)*
- Patient Assessment Forms**
- Copies of permits**
- Group equipment list**
- Communication device** (whistles, cell phones, etc. Will it work in the field? Extra batteries on hand?)
- Emergency Response Card** (from the outings leader handbook)

***Make multiple copies of these forms. An extra copy should be left with your Outings Chair.**

For life threatening emergencies or fatalities, as soon as possible, contact the Outings Department at:

1-888-OUTINGS (1-888-688-4647).

Enclosure 1 to Paper Copy of Safety Report - Accident and Incident Reports

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This 2-page Enclosure is intended to be confidential for transmission to and use by Sierra Club Angeles Chapter Outings Chairs only and should not be distributed to others without permission of the OMC or Safety Chair.

This enclosure has been removed from this version (KAS – 10March2008).