



**WILDERNESS TRAINING COMMITTEE  
POLICIES & PROCEDURES SUPPORT PACKAGE**

Prepared by Jane Simpson, WTC Chair  
For the Management Committee of The Wilderness Training Committee

Tuesday, January 27, 2009

*This package, plus separate Request and Policies and Procedures (P&P) documents comprise a package in support of the WTC Management-Approved Replacement Policies and Procedures of Dec. 11, 2008.*

**Terms:**

- WTC = Wilderness Training Committee and Wilderness Travel Course
- WTC MC – WTC Management Committee
- BMTC = Basic Mountaineering Training Course
- MTC = defunct Mountaineering Training Committee
- P&P = Policies and Procedures
- Prior P&P = 1998 Policies and Procedures
- Replacement P&P = Dec. 11 2008 WTC MC Approved Policies and Procedures

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## **WTC OVERVIEW**

Prepared by Jane Simpson, WTC Chair

On December 11, 2008, the Wilderness Travel Course (WTC) Management Committee (WTC MC) approved a Policies and Procedures (P&P) Replacement document. WTC MC is now in the process of submitting this document to the Outings Management Committee and then to the Chapter ExComm. The following will serve as an overview of WTC and primary issues over the years that have brought us to this point in time. For a more detailed history, you may read Ron Campbell's history of WTC MC and endorsement letters included in this package.

### **WTC Mission, Organization and Key Issues**

The WTC acronym refers to both the Wilderness Training Committee and the Wilderness Travel Course that it operates. Our mission, as stated in our P&P is threefold: 1) to produce informed and enthusiastic graduates who are aware "of their present limitations and their own potential"; 2) to train volunteer instructors to conduct the course as well as become certified leaders, and 3) to "sponsor wilderness travel and mountaineering related outings for the Chapter."

WTC is taught in four geographic areas: Long Beach-South Bay (LBSB), Orange County (OC), San Gabriel Valley (SGV) and West L.A. (WLA). Each area is divided into groups of approximately 22 students and 10 staff. Groups are led by a "Group Leader," an "Assistant Group Leader," and include instructors (also called assistants, or assistant leaders) filling out their staff.

150 volunteers make up WTC's staff that teaches between 230-270 students each year – many of whom are new to the Club.

WTC has its own Chapter-approved safety policy that governs the four outings during the course, setting guidelines for after-class student experience and staff-development trips. Leader ratings for our course trips range from O to M, with the only M activity being 3<sup>rd</sup> class rock scrambling, which is to be conducted only when M-rated or specially certified individuals are leading; otherwise, rock scrambling must remain at a moderate (Class 2) or I-rated level.

As the 2009 course begins, WTC has the highest enrollment in years. All four areas are filled to capacity, with approximately 270 students. There are several reasons for this, not the least of which is the fact that the internet and such resources as Meetups has provided us with new publicity avenues. Another reason for full enrollment is due to the fact that, in an emergency measure, WTC MC allowed Orange County to conduct its course for 2009 with I-rated group leaders due to the lack of suitable M-rated leaders required under the Prior P&P.

Group Leader ratings have long been a thorny subject. Efforts to modify ratings rules have been going on since the Prior P&P was adopted in 1998. This matter, along with an unfair and faulty voting procedure, are the main reasons behind the need for substantial change, and the development of a Replacement P&P that WTC MC undertook in 2008.

### **WTC History – in Brief**

From 1962 to 1987 or so, the Angeles Chapter's defunct Mountaineering Training Committee operated the Basic Mountaineering Training Course (BMTC) – a very popular course that taught M-level-and-above skills for snow and rock climbs to thousands of students. This seminal course was shut down in the late 1980's after an accident involving a student who was injured under the lax guidance of an E-level leader.

While most BMTC leaders departed when BMTC crashed, a few agreed that there were enough non-technical basics that could be taught. John Horton spearheaded the new course that was structured hastily, based on BMTC's syllabus. Horton ran the course from 1989 to 1997 as he saw fit, without any P&P. At first there were two areas: SGV and Long Beach, chaired by Georgette Rieck and John Hinz respectively. Soon, OC area began under Harry Freimanis and others; and in 1999 WLA broke away from SGV and started up with groups led by Georgette, Virgil Shields and Bill Oliver.

By 1996, several area leaders began to see that having a "benevolent dictator" Chair was not such a good idea, especially when Mr. Horton wanted to retire. These leaders saw that what they needed were *by-laws*. As the most active outings member of ExComm, Bill Oliver had become Chair of an earlier OMC and by late 1997, he asked WTC to put together a P&P, where none had existed before. The result was a contentious document cobbled together from BMTC's old by-laws by Ron Campbell and reps from the three areas that existed at that time. This 1998 "Prior" P&P was ultimately approved by OMC (Oliver) and ExComm in order to get on with business. *For more details, please read the P&P history prepared by Ron Campbell, the first elected WTC Chair, on page 16.*

### **WTC P&P Prior Voting Procedure and Amendments**

Since the Prior P&P of 1998 was approved, many amendments have been brought before areas to vote on. But, in order to approve *anything*, a majority of members (staff) voting in each area (usually the last night of class by a show of hands) was required. What this meant was that only a unanimous "yes" from four entities – the areas – could pass any amendment that would then be kicked up to OMC and ExComm for approval. In practice, this meant that a single area could, in effect, veto an amendment and therefore block submission to OMC/ExComm for approval. The "area veto" became a kind of weapon that fostered a lot of frustration and resentment over the last ten+ years. While several amendments did manage to pass, this manner of voting was not only unfair to an individual voter, but it also allowed the strongest voices in the areas to hold sway over the voting process. Ultimately, the question of the voting process fairness is especially important when we consider that the majority of people voting in 3 of the 4 areas favor the Replacement P&P and the increased flexibility expressed therein.

### **WTC Today – the Crisis and Management's Solution**

In Spring of 2008, WTC reached a crisis sparked by two events: the lack of M-rated group leaders for Orange County, and a failed amendment vote and subsequent debate. Both events caught the attention of OMC Chair Kent Schwitkis and he voiced his concern to me as the newly-elected WTC Chair. Upon further study, it became clear that WTC's voting practice was completely undemocratic and contrary to Club by-laws and SR's such as within SR 2.2.6 which calls for us to "foster an open democratic decision-making process." Kent's desire for us to review our P&P and "get our house in order" led to WTC MC's decision to tackle its P&P's, with the intention of addressing his concerns and increasing flexibility in selection of group leaders and confirmed WTC-wide staff positions. A P&P Subcommittee was formed, chaired by Bob Myers, with reps from all areas participating. *See Bob Myers' report on p. 6.*

Saving Orange County: As WTC Chair, my first order of business was to help Orange County stay alive and to keep its invaluable staff involved. (No less than 6 of its members hold key WTC-wide positions). Kent's focus was on WTC's proven ability to bring new members into the Sierra Club via outings and outreach; therefore, continuing to "serve" this large geographic area, with its huge pool of hiking enthusiasts was essential. The solution was a special emergency vote conducted by WTC MC to allow OC to exist for the 2009 class with its own choice of leaders (under WTC's safety policy), leaving the final decisions to the area management, principally the Area Chair.

The 2008 Failed Amendment: the other event, the failed amendment, concerned the rating of our Outings Chair. Two areas did defeat the amendment that called for relaxing the M requirement for this position from which our E-rated Outings Chair, Tom McDonnell, was seeking to retire. The failure was not specifically due to the area veto, but more to the unfortunate misconception held by the most influential voices that only an M or above could handle this duty, when, in fact, the job has become much more administrative and there is in place a Safety Committee and MOC that gets involved with the few M-restricted trips that we might lead.

Group Leader Ratings and the M Debate: The controversy that arose over the amendment failure amplified a long-festering related issue: the leadership rating requirements of our Group Leaders and certain confirmed staff. This hot-button topic has been going on since the Prior P&P was adopted. Once WTC MC began to review our P&P and discussions and meetings were held during 2008 by each area, it was found that most leaders had come to believe that WTC's main activities were mostly I-rated and therefore, the concept of group leadership and the need for only M's in top leadership roles had evolved.

By looking through the endorsement letters (starting on page 7) included in this package, you will learn more about this issue, with opinions written by many of our long-standing M and E Group Leaders.

Input and Opinion Assessment: In addition to its own P&P review process, WTC MC solicited input from all current and recently retired group leaders. We heard from Safety Chair Phil Wheeler, from Kent Schwitkis and ExComm Chair Mike Sappingfield. We modified as we went and addressed concerns along the way.

Among the 24 WTC-wide group leaders, seven prefer the Prior P&P's area veto and group leader rules requiring at least one M and one I who has passed rock and snow checkoffs. However, they do not all share the same degree of vehemence on these issues. Five of them do understand that something needs to be done to preserve WTC and they can see that some of the replacement document works for them. Even the two most vehement dissenters (one from SGV and one from LBSB) agree that WTC is worth the effort we all put into it.

Other views will be presented by individuals separately.

## **Finally**

At the same time that all of this is going on, WTC has more leaders on an M-track, having passed rock and snow or on their way to this goal. Many of these same individuals possess not only the hard skills but also the soft skills such as teaching ability that make a good group leader. A few are among those who are now leading OC groups for 2009. Further, many are already seasoned as active I-rated leaders leading the necessary trips we need for students to graduate.

WTC will always need to teach responsibly, act safely and inspire students successfully. Some Group Leaders are better at this than others and assessing their abilities is not presently management's job beyond what we might require from Safety. For the future, I can see that the course will endure and be stronger by the involvement of new people as well as seasoned I-rated and M-rated leaders who will lead the classes but also provide us with the summer experience trips our students need for graduation and for their own development as outings leaders for the Chapter.

It is simple...  
Change or die.

Respectfully,  
Jane Simpson  
WTC Chair  
WTC WLA Group 3 Instructor  
I-rated leader and E-Nav Examiner

## **Development of Replacement Policies and Procedures**

Prepared by Bob Myers, WTC MC P&P Subcommittee Chair

At its May 14, 2008 meeting, the Management Committee established a subcommittee to review its policies and procedures and make recommendations for change. The subcommittee consisted of a representative from each area: Steve Curry representing SGV, David Meltzer representing Long Beach/South Bay, Robert Myers representing WLA, and Edd Ruskowitz representing OC.

The Subcommittee convened four meetings on June 17, 2008, July 15, 2008, August 12, 2008, and November 17, 2008. The Subcommittee sought to develop a document that would be supported by all areas. All of its recommendations enjoyed the support of all of its members. In reviewing the prior P&P, the Subcommittee decided that changes were required in four principal areas:

1. Updating terminology to be consistent with current practice.
2. Streamlining job descriptions and providing flexibility in the job descriptions of persons performing key functions within WTC.
3. Addressing group leadership requirements.
4. Addressing voting requirements.

The development of the Replacement Policies and Procedures was a long and careful process:

- ▶ The Subcommittee considered several drafts before presenting its initial recommendations to the Management Committee on August 19, 2008.
- ▶ The Management Committee reviewed the initial document on August 19, 2008, made revisions, and authorized its chair to seek input from key Club leaders.
- ▶ At its meeting on September 9, 2008, the Management Committee reviewed a revised document, approved it in concept, and requested that the document be widely circulated within WTC. The WTC Chair had separate meetings with leaders in San Gabriel Valley, Long Beach/South Bay, Orange County and WLA to hear their ideas and concerns.
- ▶ At its meeting on October 14, 2008, the Management Committee heard concerns from one of its San Gabriel Valley leaders and a summary of comments received to date. It requested that the Subcommittee return with a revised document at its November meeting.
- ▶ At its meeting on November 18, 2008, the Management Committee received a revised document from the Subcommittee. After reviewing the document and making additional revisions, the Management Committee voted to have the document widely distributed and considered for adoption at its December meeting.
- ▶ At its meeting on December 11, 2008, the Management Committee had an enlarged meeting with participation from leaders from all areas. Following discussion, the Management Committee made revisions to the document and approved the Replacement Policies and Procedures.

The above process ensured that all WTC members were given an opportunity to comment on the new policies and procedures. Many members submitted written comments that were incorporated into the document. All the comments were helpful in drafting a document that garnered wide-spread support.

## **The Replacement P&P and the December MC and Group Leader Meeting**

WTC's P&P subcommittee finally came up with two voting procedures for consideration at the December 11, 2008 meeting. After areas polled their leaders, a majority of group leaders in LBSB, OC and WLA accepted Approval Procedure No. 1. Further, most of these same leaders also agreed with the Replacement document. A few leaders in SGV also approved voting procedure No. 1.

For your review, here are the two voting procedures that WTC MC considered and presented at the meeting. **Procedure No. 1 was approved and is in the Replacement P&P.**

### **VI. APPROVAL OF POLICIES AND PROCEDURES**

6.1 These Policies and Procedures form the charter for the Committee. They shall not be superseded, save by rulings of the Sierra Club or by operation of law.

[Note: What follows are two alternative Approval Procedures. The Procedure that is ultimately selected will be the Procedure used to approve these Replacement Policies and Procedures.]

#### **APPROVAL PROCEDURE NO. 1 (REPRESENTATIVE VOTING, APPROVED)**

6.2. Amendments to these Policies and Procedures shall be initiated by a majority vote of the Management Committee acting as the elected representative body of WTC as whole or may be directed by the OMC or by Chapter ExComm. Any member may request that the Management Committee consider a proposed amendment. Before approving an amendment and forwarding it to OMC, the Management Committee will consult with group leaders, assistant group leaders, and Committee Confirmed Staff. Amendments shall be effective only when approved by the OMC and confirmed by the Chapter ExComm.

#### **APPROVAL PROCEDURE NO. 2 (DIRECT VOTE METHOD)**

6.2. Amendments to these Policies and Procedures shall be initiated by a majority vote of the Management Committee or may be directed by the OMC or by Chapter ExComm. Any member may request that the Management Committee consider a proposed amendment. Any amendments initiated by the Management Committee shall be submitted in writing to all WTC members eligible to vote under Section 3.1.3 by mail or other comparable electronic format approved by the Management Committee with a return ballot for the member to vote in favor of or against the amendment submitted for approval. The ballot materials shall include arguments for and against the proposed amendment. Any member shall be given an opportunity to submit arguments for or against the measure. The ballot shall be due no later than two weeks after the ballot materials are provided to members. To approve any amendment, a majority of the members voting on the question of its approval must vote in favor of the amendment. Amendments shall be effective only when approved by the OMC and confirmed by the Chapter ExComm.

## **WTC REPLACEMENT P&P ENDORSEMENT LETTERS**

### **TOM MCDONNELL ENDORSEMENT LETTER**

January 12, 2009

To: Jane Simpson, WTC Chair

From: Tom McDonnell, WTC Outings/WTC Safety

Subject: Support for WTC Re-organization

This memo is intended to convey my support for the new WTC Policies and Procedures. You may convey this memo to the Outings Management Committee (OMC) or ExComm of Angeles Chapter, Sierra Club as necessary.

In order to endure, achieve its mission, and serve the Sierra Club, WTC must be reorganized with new Policies and Procedures. This is my opinion based on 16 years of experience with WTC as well as with the Chapter outings program.

The WTC Management Committee recently approved a new Policies and Procedures that substantively changed the structure of WTC. The new format provides for group leadership by I rated leaders and for a new internal voting protocol.

It is necessary to open group leadership (the fundamental units of WTC) to I rated leaders because this provides for a great quantity of existing leaders to assist with WTC instruction. The prior format required that the Group Leader be an M rated leader, which is a persistently dwindling resource throughout the Chapter. The WTC class outings can easily be maintained at the I level. The M rated Group Leader is a vestige of the former Basic Mountaineering Training Committee that instructed the use of ice axes and ropes, which WTC does not.

The WTC management committee has struggled with the prior format requiring M rated leaders and the persistently dwindling M leader resource since the 1997 when the prior format was initiated. A suitable remedy to the problem has not been achieved principally due to the prior voting protocol prohibiting a majority of the membership from implementing a change to the Policies and Procedures. The new Policies and Procedures provide for the management committee to implement changes, which will allow WTC to respond more quickly to changes within the leader resources and to the potential marketing environment for WTC.

For reference, my WTC and Angeles Chapter outings program service includes:

- WTC student in the Long Beach area in 1993
- WTC staff in 1994 in Long Beach
- WTC staff in Orange County in 1995 - 1997
- Served 11 years as WTC Group Leader in Orange County 1998-2008
- During this time served 9 years on the WTC management committee (1997-2005); beginning with the first meeting of the management committee in 1997; and including 3 years as WTC Chair
- I have also served 6 years as WTC Outings Chair (2003-2008)
- Currently I serve as WTC Outings and WTC Safety Coordinator
- I represented WTC at OMC when it was reorganized and helped develop the Outings Governance Policy

I have also been awarded Angeles Chapter leader ratings

- I rating 1996
- M rating 1999
- E rating 2003

I have participated in the Chapter Outings program by leading many trips and by contributing to the Leadership Training Committee as an examiner for the rock and snow technical requirements. I am a member of these Chapter entities: DPS, SPS, and HPS.

The Outings Mission Statement of the Angeles Chapter is: "To maintain and enhance a diversified, superior, volunteer-run outings program that supports the Sierra Club's conservation mission by connecting people with the natural world and with the Club."

WTC is a continually enhancing volunteer-run program that supports the Club's mission. Many of the WTC participants are non-Club members and many join as a result of WTC. The natural world is introduced through four different outings presented by WTC and the Club. The WTC experience is a perfect way of connecting people with the natural world and with the Club.

I sincerely hope that OMC and ExComm support the new Policies and Procedures for WTC so that it may grow and continue to serve the Chapter and the Club.

## **PHIL WHEELER ENDORSEMENT LETTER**

4 January 2009

To: Angeles Chapter OMC; Angeles Chapter ExCom

From: Phil Wheeler, Chair, Angeles Chapter Safety Committee;  
Member, Finance & Risk Management Advisory Committee  
FaRM Liaison to Outdoor Activities Program Team

Subject: Needed Revision in WTC Policies & Procedures (P&P) Document

I will minimize restating history and focus on issues where I have personal knowledge and/or which relate to Safety Committee issues.

The WTC P&P, specifically the procedure for their amendment, has concerned me for some years. In the late 1990s I was a member of the first “post John Horton” WTC Management Committee. At that time I read the amendment procedure and noted that it seemed rather un-democratic, giving a small majority in one of four WTC areas the ability to nullify a change supported unanimously by all leaders in the other three areas; moreover, such a clause seemed inconsistent with the Club’s use of Robert’s Rules of Order (now documented in the Chapter bylaws).

Later, as PV-SB representative on ExCom, I was a member of the Outings Review Task Force (ORTF) chaired by Virgil Shields. At the time it was clear to me that our recommendations spanned the entire scope of the Chapter outings program, including WTC; I believe the Outings Governance Policy adopted by ExCom in June 2003 unequivocally codifies the authority of OMC over the Leadership Training Committee (of which I’m a member), the Safety Committee (which I chair) and the Wilderness Training Committee (for which I’ve been an occasional instructor and lecturer during the past ten plus years).

There is small minority of WTC members (instructors/leaders) which opposes changing the P&P amendment procedure to make it democratic and consistent with Robert’s Rules of Order. Some appear motivated by a loss of control, because they will no longer be able to veto the will of the majority. This is not a credible reason to resist this change.

A few others object to a change (eliminating the “two-M rule”) which would allow groups to be led by leaders with a leader certification below the M level, using words like “WTC has always been an M-rated course”. But WTC is a course, not an outing – and teaching a course has never been the object of our leader rating system. Speaking for the Safety Committee, we require that all outings be led by two leaders with ratings equal to or higher than the rating of the outing itself – and the WTC Safety Policy we approved last Spring has words which ensure requirement is satisfied for each type of outing led in conjunction with the course. The leadership rating of instructors is not a safety and risk management issue.

Group leaders should be selected based on their ability to organize the Wilderness Travel Course and teach it, not their rock and snow climbing skills. Of course, if more experienced, highly-rated leaders are available and suitable to lead the course, so much the better; but we cannot let the very existence of WTC be threatened by making M-rated group leaders a requirement.

The Wilderness Travel Course is a vital element of the Angeles Chapter outings program and a major source of new members and new outings leaders. We must ensure its continued existence by bringing the WTC Policies & Procedures into the 21<sup>st</sup> century and into compliance with the democratic decision processes used throughout the Sierra Club.

## **VIRGIL SHIELDS ENDORSEMENT LETTER**

January 21, 2009

From: Virgil Shields

To the Outings Management Committee & Angeles Chapter Executive Committee:

I'm writing this letter as an endorsement for the revised Wilderness Travel Course Policies and Procedures document being submitted for approval by the Outings Management Committee and the Angeles Chapter Executive Committee. This revised document is intended to result in a healthier Sierra Club outings program that is in accord with our Sierra Club goals. The revised document that is being addressed allows for greater participation by individual leaders in the Wilderness Travel Course program in accord with our organizational bylaws.

Our Wilderness Travel Course program offers our Angeles Chapter the opportunity to provide an introduction to the outdoors for many. The present full enrollment for this year attests that there is a great desire out there for us to address. Present operational restrictions to this program that are addressed by the revisions have reduced the program effectiveness and have no bearing on the safe operation of the program.

The purpose of our Sierra Club outing programs, in accord with the mission of the Sierra Club, is to introduce members and the public to the wonders of the natural world with the goal of enhancing the awareness of the need to actively be involved in the stewardship and protection of the wild areas that we have the privilege to enjoy. Our classes, such as the Wilderness Travel Course along with a number of others, offer a major portal for achieving our Club goals. The revisions included in the Policies and Procedures document remove many of the hindrances to our achieving our Sierra Club goals through our Wilderness Travel Course program.

During my years on the Angeles Chapter Executive Committee and while Chapter Chair, part of my focus was to help improve the health and viability of our outings programs. We achieved this by revising the outings management structure in a way that improved communication and participation by all of the leaders in the oversight of our programs. We created the Outings Management Committee as the body that oversees all outings activities within the Angeles Chapter. The Outings Management Committee was charged with making sure that the outing programs worked well and also with putting together and approving policies and procedures that would help to do this. Overall this committee has increased the awareness throughout the Angeles Chapter of our outing programs as an integral component of our environmental and political activism.

I've been a leader in the Angeles Chapter Wilderness Travel Course and a leader and lecturer in the predecessor Basic Mountaineering Training Course, starting back in 1977 and I know its purpose and goals. These goals have always been in support of the Sierra Club mission to increase the number of advocates for our environmental needs.

Our Sierra Club now more than ever needs to open its portals wide to bring in new supporters and advocates. The Wilderness Travel Course has shown itself to be a major opening for us. Many participants, including the founders of the original Basic Mountaineering Training Course, have gone on to be strong activists in our environmental and political pursuits.

The present revisions will help us achieve our goal of keeping a valuable institution like the Wilderness Travel Course going and expanding.

Virgil Shields

WTC Group & Assistant Group Leader – 13 yrs

WTC Safety Coordinator – 10 yrs

BMTC Group & Assistant Group Leader – 12 yrs

BMTC Rock Climbing Lecturer – 6 yrs

Leadership Training Committee Rock Climbing Chair – 4 yrs

Rock Climbing Section Chair & officer – 4 yrs

Angeles Chapter Executive Committee – 6.5 yrs

Angeles Chapter Chair – 3 yrs

National Sierra Club Council of Club Leaders Executive

## **BILL JACKSON ENDORSEMENT LETTER**

Sunday, January 11, 2009

To: OMC  
From: Bill Jackson  
Subject: WTC Bail-Out

I have been asked to write a letter endorsing the changes in the WTC Policies & Procedures. I am happy to do so.

First, I am supposed to tell you about my credentials and why the heck you should pay any attention to me.

I moved to California in 1975. One night I was watching a travelogue show on Channel 5 and somebody was showing home movies of backpacking on the John Muir Trail with a side trip to Waterwheel Falls. I decided I had to do this. So I took a hike to Waterwheel Falls. The scenery was fantastic, but I realized I really didn't know what I was doing. Soon thereafter I was visiting a lady friend who was a Sierra Club member and had a copy of the Schedule of Activities on her coffee table. I looked at it and found out about the Basic Mountaineering Training Course (BMTC). I joined the Sierra Club and enrolled in BMTC in 1976. It turned out to be a major life-changing event. I took BMTC and learned about stuff I didn't even know existed. In 1977 I joined the staff. Some time in the mid 1980's (the records are lost) I became an M-rated leader and a group leader in BMTC. I became a lecturer and have given the course review lecture from 1982 through the present day. I became the Vice-Chair for the SFV Area and served on the Mountaineering Training Committee (MTC). I was at all the critical MTC meetings dealing with the major ice axe accident, the insurance crisis, and the dissolution of BMTC. When WTC started up, it was small and there were plenty of M-rated leaders, so I just continued to give the review lecture. WTC grew and the number of active, able-bodied M-rated leaders shrank, so in 2001 I was called out of semi-retirement to once again be a group leader in WTC. Eight years later I had become too old and decrepit to do this in a way I found satisfactory, so I am retiring as a WTC group leader. I expect to keep lecturing as long as they invite me back. I am a member of the Angeles Chapter Outings Management Committee and serve as secretary-for-life and Outings Ombudsman. I am also a member of a Sierra Club national committee, the Conflict Resolution Team, where I work on mediating conflicts at other chapters.

Now let's turn to the revised WTC P&P's, or what I call the WTC Bail-Out Bill. This must be approved to save WTC. Otherwise it will go under. WTC needs to be saved. WTC brings new members into the Club. WTC turns ordinary members who would otherwise just pay their dues and read their magazine into enthusiastic outings participants. WTC motivates outings participants to become outings leaders. No other group, section or committee does these things as effectively as WTC. The existence of WTC is not threatened by any lack of commitment on the part of the volunteers who run this program. It is threatened by anachronistic organizational elements which must be corrected. The proposed revised P&P's have many improvements, but there are two issues that are of paramount importance: (1) the area veto; and (2) the 2-M rule.

WTC is organized into four areas: West Los Angeles, Long Beach/South Bay, San Gabriel Valley and Orange County. Each presents the course at a separate location. The current P&P's have a provision that any change in the P&P's must be approved by all the areas, each voting separately. I imagine this provision was well-intended, but it has turned out to be a suicide pact. The practical effect is that a very small number of people on one area can block the will of the majority in making necessary changes to adapt to a changing environment. Some folks like to argue that this is contrary to Robert's Rules of Order. I find this argument awkward. I prefer to say that the area

veto is undemocratic and contrary to Sierra Club Standing Rule 2.2.6 (A)(2)(G), which requires us to “Foster an open democratic decision-making process.” The WTC Management Committee has proposed a new set of P&P’s which eliminate this undemocratic feature. It should be approved.

The second critical change is elimination of the 2-M rule. WTC took the basic course design of BMTC and eliminated the technical mountaineering activities that were inconsistent with the new insurance restrictions. That means that WTC does not really conduct M-level outings. But at the time that WTC was created, there were plenty of M-rated leaders available to be Group Leaders and Assistant Group Leaders, so I suppose the founders of WTC thought it would be fine to maintain the BMTC policy that each group needed to have a Group Leader and an Assistant Group Leader who were M-rated. In the years that have passed since the founding of WTC, the production of new M-rated leaders has slowed to a trickle for a variety of reasons which I will not discuss in detail here. The bottom line is that the production of new M leaders has not kept pace with the retirement of old M leaders and the supply of active, able-bodied, M-rated leaders has shrunk considerably. The effect on WTC is that it has been increasingly difficult to continue to adhere to the 2-M rule. This year the Orange County area was faced with extinction because of the shortage of M leaders. The other areas are all just one or two retirements away from having to cut the number of groups. If this trend continues, WTC will be on the road to extinction.

Now I want to say something about the argument that having over-rated leaders somehow contributes to safety. The accident that created the insurance crisis and largely eliminated technical mountaineering from the Sierra Club occurred on a BMTC ice ace practice that was led by an E-rated leader who exercised abysmally bad judgment. There is no guarantee that highly-rated leaders will have good judgment. Vintage M leaders like me could earn an M rating without ever leading a serious technical climb or a snow trip. You just had to pass check-outs which tested a limited range of technical skills – skills which have no place on WTC outings. The 2-M rule needs to go. We just need to select leaders who are appropriately rated for the types of trips WTC runs and who have good judgment.

## GEORGETTE RIECK ENDORSEMENT LETTER

**From:** Georgette\_Rieck@wellsfargois.com  
**Subject:** RE: WTC P&Ps  
**Date:** January 23, 2009 2:33:46 PM PST  
**To:** jsimple@earthlink.net

Dear Jane,

As a founding member of WTC, (25 years of Service as a BMTC group leader, BMTC Area Chair for San Gabriel Valley, & WTC Group leader for West L.A.) I'm writing to provide you with a little history and to tell you why I propose the approval of Procedure No 1.

My involvement was sitting night after night at my dining room table with John Horton & Harry Freimannis to iron out some type of a business plan and curriculum that John could present to management as WTC was going to be a *start up* and management approval was needed. (I still chuckle when I think of Freimannis and his numerous spreadsheets. At the time he was working as an engineer and each evening he would dazzle John and I with his millions of pages of spreadsheets!!) Most existing BMTC group leaders and staff felt there was no longer anything in it "for themselves" and felt that anything less than teaching the use of ropes and ice axes was not a challenge "for themselves". Those folks walked. Those that remained were recruited to move forward with WTC once it received management approval. I believe we were up and running in 1989 or thereabouts. During those times, aside from involvement from Joe Wankum (I believe that was a bit later on from the times we would meet in my dining room...) at no time do I recall that John Hinz was involved with formulating thoughts & ideas for WTC. That's not to say he wasn't involved because he may have communicated a lot with John Horton, however John Horton kept a lot of things close to his vest so I wouldn't necessarily have known about discussions between Horton and Hinz. Once management approval was granted though, I didn't continue to be greatly involved with the politics portion (of who was involved or who did what) since my passion was in conducting the class & teaching/leading field trips.

Regarding the Policy & Procedures, specifically 'approval procedures', I believe the current method we have does not allow for a fair vote count. An Electoral vote process is not representative of how the majority has voted. In the interest of doing what is best for WTC, I believe Procedure #1 is the way to go. To have one single area hold the power to stop changes which could benefit WTC is preposterous. I am strongly in favor of Procedure No 1.

If I'm able to access my archives, I'm sure I could come up with more information regarding what went on during the days that WTC was formulated. Let me know. I hope this information is helpful. If not, --tell me what I should elaborate on and I'll do it. Talk later.

G

Georgette Rieck, Account Executive  
Wells Fargo of California Insurance Services, Inc.  
BMTC Group Leader  
WTC SGV Founding Chair  
WTC WLA Group 1 Leader

## **RON CAMPBELL ENDORSEMENT LETTER**

Jan. 12, 2009

Chapter ExComm  
Angeles Chapter, Sierra Club

Via Jane Simpson, WTC

I strongly endorse the proposed new Policies & Procedures for the Wilderness Training Committee.

As the chair of the original P&P committee in 1997 and subsequently WTC's first elected chair, I have frequently considered the strengths and weaknesses of what we did then.

Strengths: The original P&P created a democratic structure for WTC, replacing what had been one-man rule. That in turn made WTC far more dynamic, far more responsive to the needs of its students and the values of its volunteers. To offer just three examples: WTC created a new area to serve West LA, updated its lectures and completely revised its student handbook. I don't think any of these changes could have happened under one-man rule.

But the original committee made some obvious mistakes. Two of those mistakes became apparent almost immediately and have since stymied the organization. First, the original P&P committee failed to confront the shortage of M-rated leaders and to determine how WTC could grow while relying on fewer M's. Second, we did not think through our voting system, leading to an area veto that has frustrated the majority of our members for years.

The revised P&Ps would fix both of these problems.

I urge your approval.

Sincerely,

Ron Campbell  
WTC Chair (1997-1999)  
OC Group 2 Leader (1993-2008)  
LTC Vice-Chair (current)  
Safety Committee (current)  
M-rated leader (current)  
SC Life Member

## WTC HISTORY AND P&P HISTORY

Dec. 17, 2008

To: Jane Simpson  
From: Ron Campbell  
Re: History of WTC management

Jane,

You asked me the other day to summarize in writing the history of WTC management. I have first-hand knowledge of the organization's management beginning in spring 1990, when I joined the staff, and fairly complete knowledge beginning in spring 1992, when I helped Harry Freimanis found the Orange County Area. While I know something of the period before 1991, my information is largely second-hand; there are others – most notably Joe Wankum, John Hinz and Georgette Rieck – who know this period better.

### Pre-history

The Basic Mountaineering Training Course began in the early 1960s. By the mid 1970s it routinely drew 1,000 students to five areas – the four areas we have now (Long Beach, West LA, San Gabriel Valley and Orange County) plus San Fernando Valley. Circa 1987 a serious accident occurred during the Snow Travel trip; one group leader, in defiance of a directive from the safety chair, led his group to Baldy Bowl, where a student was severely injured by an ice ax. This accident had profound and lasting consequences for the entire Sierra Club. Several years passed before the Club was allowed to lead trips requiring the use of an ice ax or rope. To this day, the Club cannot train novices in the use of technical ice and snow gear.

BMTC operated a truncated course in 1988, without ropes or ice ax. When it became clear that the ban on technical gear would not simply go away, many BMTC leaders quit. It appeared the class would die out.

### Founding of WTC

But one BMTC group leader in Long Beach, John Horton, believed the course could be taught in a more limited form. With a handful of other leaders he approached the Angeles Chapter ExComm and proposed the creation of a successor to BMTC, the Wilderness Travel Course. ExComm approved, and the first WTC classes were taught in Long Beach and San Gabriel Valley in 1989. John was appointed chair by ExComm. John Hinz became Long Beach area chair; Georgette Rieck filled the same role in San Gabriel Valley. Joe Wankum became John's assistant.

As a personal aside, I took WTC in 1990, its second year, and was an assistant in Long Beach Group 3 in 1991 and 1992. Immediately after joining the staff I became the publicity and discounts coordinator. In 1993 we opened the Orange County area, and I became the founding leader of Group 2.

John Horton was a remarkably energetic chair. He created the organization in mid 1988 and remained as chair until spring 1997 – nine years, or three times longer than the next-longest chairmanship. But John was very protective of his authority. By 1996 he was chair, safety chair, Forest Service liaison, bus coordinator and newsletter editor; he may have held other titles that I no longer remember.

### Rising discontent

In early 1996, with a few weeks notice, John told every group leader that they had to attend a mandatory avalanche class at Rock Creek. While the class itself was wonderful, I and other leaders

in Orange County resented that John had given us so little notice of a major change in requirements for leadership.

That autumn, several things happened. John told the area chairs that he wanted to retire; it was up to them to find a replacement. At graduation, Long Beach Area Chair Don Creighton approached me and asked if I was interested in the job. I said yes. On Thanksgiving Day, Don called me and told me I had the job. But John resisted the area chairs' decision. He said he'd stay on another year.

About the same time, John circulated a draft safety policy. I no longer remember the details, but it prompted a revolt among the Orange County leaders. After we discussed our concerns, I drafted a letter, which the OC leaders unanimously approved; our area chair, Barbara Reber, signed the letter and sent it to every area chair and group leader in WTC. The letter said in part:

... But that misguided policy is just a symptom of what ails WTC. We believe our organization needs to make some basic changes. Here they are:

1. WTC should have bylaws, clearly defining how we choose our committee leadership and what their responsibilities are. Specifically, the chair of WTC should be elected, either directly by the membership or indirectly by elected representatives of the members.
2. WTC should have a budget. That budget should be available to all members. ...

I know, pretty radical stuff. But in 1996 it WAS radical. The letter invited the other areas to elect representatives to meet to decide WTC's future.

On Jan. 2, 1997, ExComm appointed Bill Oliver chair of Outings Management Committee and specifically directed him to oversee the writing of policies and procedures for WTC and the election of a chair to replace John. About this time, the three areas then existing (LB, SGV, OC) each elected two representatives to help write the policies. Bill appointed me to chair the policies and procedures committee.

John was not happy about this. On Jan. 18, 1997, he wrote a vitriolic e-mail to Bill Oliver, objecting to the creation of the new committee and to Bill's oversight role. Key quote: "I do not want the WTC instructors thinking about Angeles Chapter policies, when the safety of students is at risk. I do not want the instructors discussing Angeles Chapter politics, even among themselves, when they should be providing the best instruction available and undivided attention to the students. ... Bottom line, cease the Sierra Club politics."

#### Policies & Procedures Committee

Against that happy backdrop, the committee met for the first time on Jan. 24, 1997. It met twice more before approving the policies and procedures. While we discussed what we were doing at area meetings, we obviously had to avoid offending John, who was still in charge. The members of the committee, in addition to myself, were Beth Epstein and Tracy Sulkin for SGV; Joanne Andrew and Michael Wehner for LB; and Barbara Reber and Dave Shuman for OC.

We largely followed the old BMTC bylaws. The issues that have been the most vexing since then – the two-M rule and the area voting procedure – got little or no discussion at the time. We spent a lot of time arguing over who should vote (just the M's and E's? the I's too? Everybody?; we finally settled on everybody) and whether to have a conservation chair (a lost cause championed by Beth and me).

We distributed the draft policies to every area in late February or early March. John Horton appeared in OC to speak against their adoption. OC approved them anyway. John may have spoken in other areas; I don't know. In early April 1997 the elected management committee met for the

first time and elected me chair. John and I never spoke after OC approved the policies and procedures; he turned over some WTC documents to Joe Wankum, who in turn gave them to me.

You know the history since then. I wish I could shed more light on the peculiar voting system for amendments that we created. The policies committee gave it no thought at the time. We believed – and I continue to believe now – that the survival of WTC was at stake in the winter of 1997. We made the changes that we believed would keep WTC alive for a while, until someone with more time could do a better job.