

# **Angeles Chapter Outings Chair (OC) Training**

**2 November 2008**

**Developed by**

**Phil Wheeler -- Safety Chair**

**Tina Bowman -- LTC Chair**

**Kent Schwitkis -- OMC Chair**

# Agenda/Topics

- § **Why Angeles Chapter OC Training?**
- § **Outings Organization: National & Chapter**
- § **Some Basics: Outing Definition, Policy Priorities and National Leader Standards**
- § **Outings Chair Responsibilities**
- § **Outings Approval: General**
- § **Restricted Outings Approval**
  - Local Entity International Outing Approval
  - Mountaineering Outing Approval
- § **Financial Matters**
- § **Outings Publication Options**
- § **Problem Behaviors (Participants & Leaders)**
- § **The Angeles Chapter Outings Assembly**
- § **Questions and Answers**

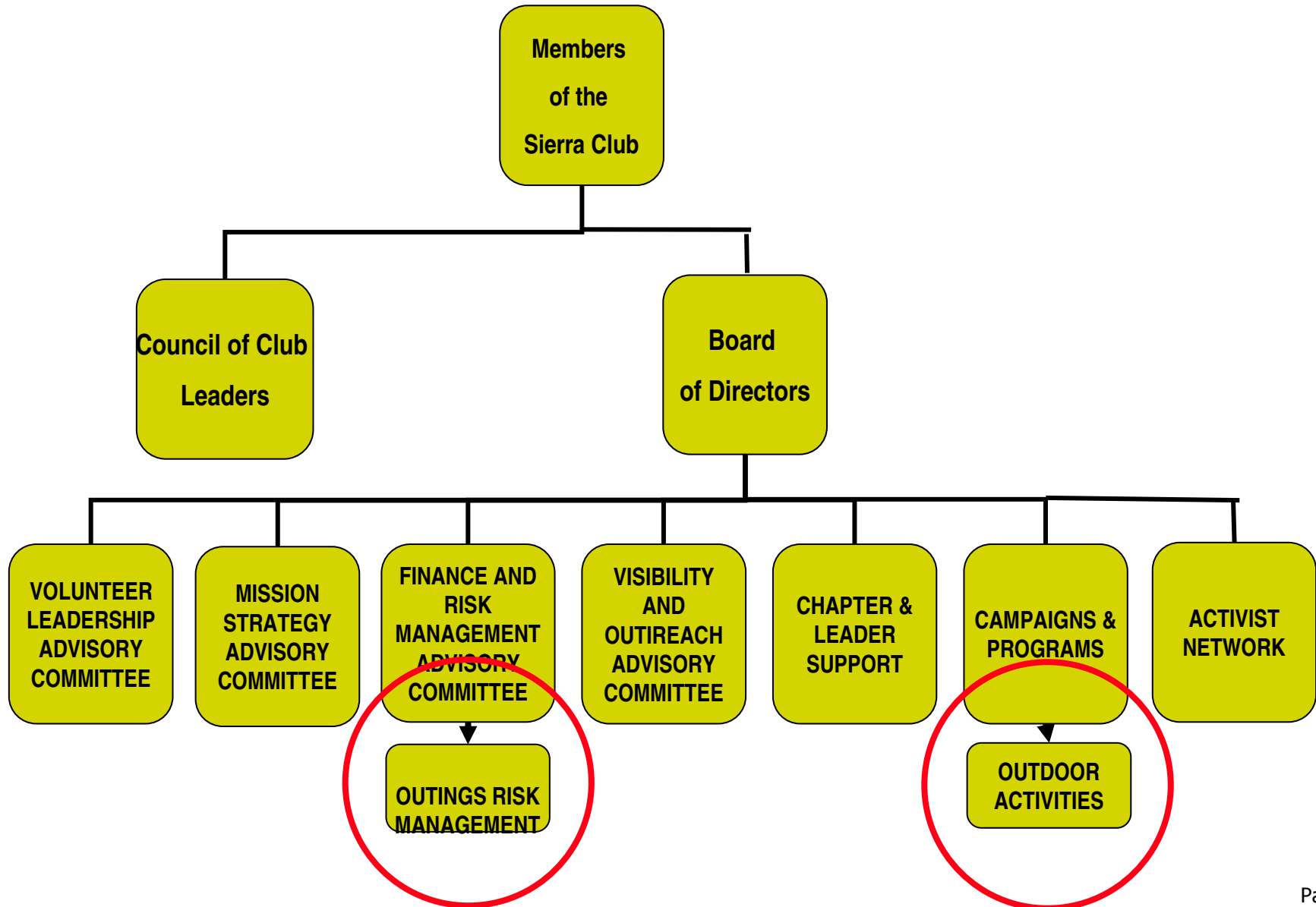
# Why Angeles Chapter OC Training?

- § **The Chapter has over 50 outings chairs, each selected by the sponsoring entity but with no vetting by the Outings Management nor Safety committees**
  - We've had standard Chapter training for outings leaders for over 30 years
  - We have no corresponding minimum standard training for outings chairs; most learn by on-the-job training.
  
- § **National has developed a good OC training course in the past several years. But:**
  - Sending all our OCs to this training, even if there were openings (only 50 or so openings per year -- with 500 or so Club OCs), would be prohibitively expensive
  - The national training does not deal with some important procedures and requirements unique to Angeles Chapter, while we can provide such focus
  
- § **OMC and Safety have a goal of delegating authority to outings chairs in areas such as final outings approval**
  - Minimum standard OC training is essential to make this goal attainable.

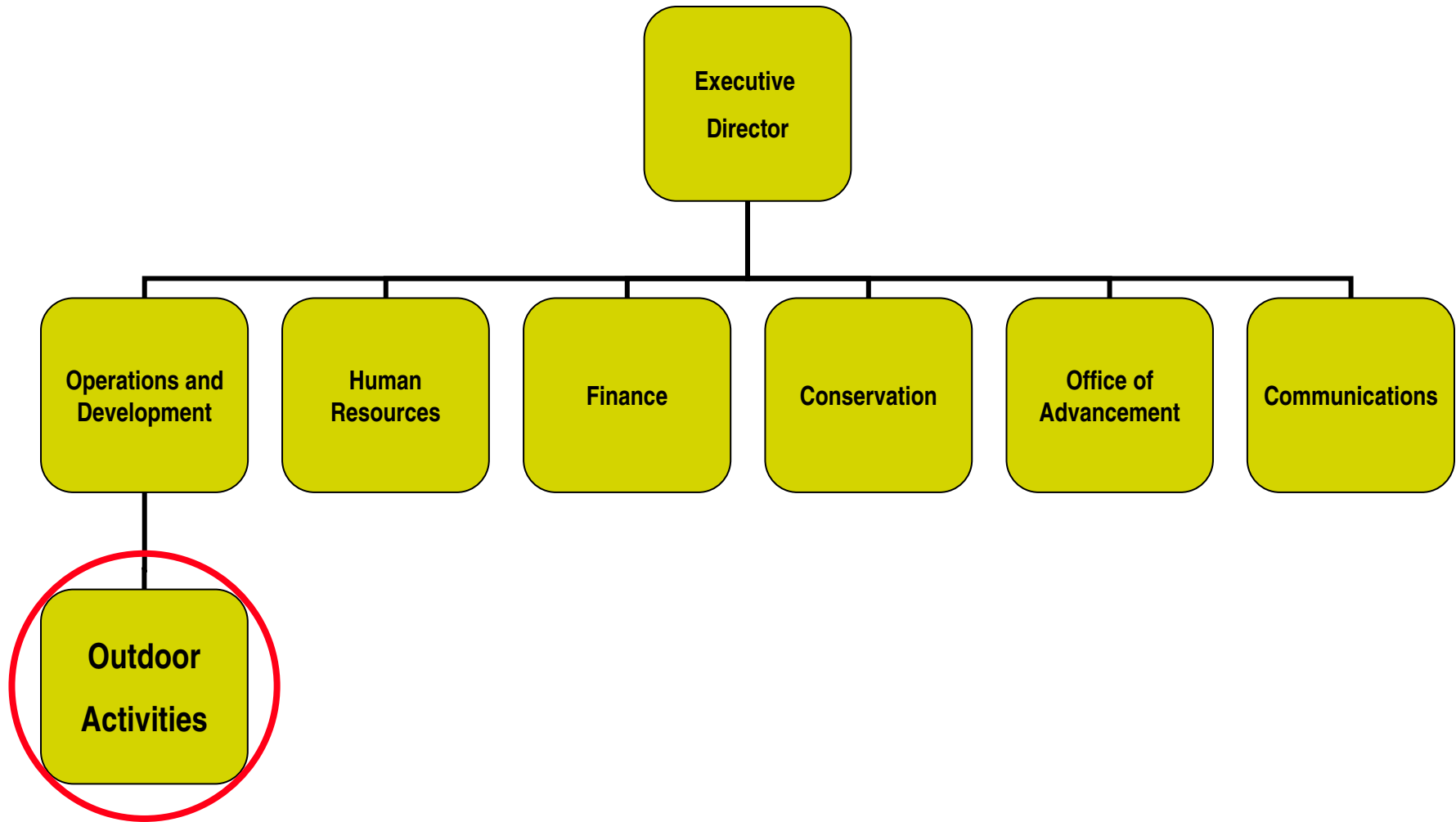


# **Outings Organization: National & Chapter**

# The Volunteer Side



# The Staff Side





# Outings Management Committee Overview

- § **The current OMC construct was established by the Chapter ExCom in 2003: “Angeles Chapter Outings Program Governance”, 29 June 2003. OMC responsibilities include:**
  - **Oversee all aspects of Chapter outdoor-related activities (regional groups, activity sections, task forces, committees, Inner City Outings, etc.)**
  - **Recommend related policies to ExCom, establish guidelines and subcommittees, and recommend subcommittee chairs -- including Safety Committee, Leadership Training Committee and Wilderness Training Committee**
  - **Determine requirements for scheduling, planning, approving and publishing outings**
  - **Maintain outings records**
  - **Delegate authority to the Outings Chairs of Angeles Chapter entities**
  - **Meet at least three times a year (currently there are six meetings per year)**
  - **Conduct an annual Chapter Outings Assembly**
  
- § **OMC members include OMC Chair, Safety Chair, LTC Chair, WTC Chair -- appointed by Chapter ExCom -- and five representatives designated by the Chapter Outings Assembly (nine voting members) -- and one ICO rep -- and additional non-voting members as required to accomplish the business of OMC.**
  
- § **The current OMC Chair (Chapter Outings Chair) is Kent Schwitkis**

# Safety Committee Overview

- § **The Safety Committee predates the OMC and is somewhat unique: Few chapters have a similar Safety Committee.**
- § **Safety Committee responsibilities, delegated by OMC, include:**
  - Certify Angeles Chapter outings leaders, based on LTC recommendation
  - Approve Chapter, Group, Section and Committee sponsored outings
  - Maintain the Chapter Safety Policy
  - Provide an annual Chapter Safety Report
  - Investigate reported incidents, working with outings chairs -- and the national office Local Outings Manager when circumstances so dictate
  - Maintain a record of all past incidents, their investigations and the resolution
- § **Safety Committee members include the Safety Chair, OMC Chair, LTC Chair, WTC Safety Coordinator and others appointed to do the work to meet the Committee responsibilities.**
- § **The current Safety Committee Chair is Phil Wheeler**

# Leadership Training Committee Overview

- § **The LTC has existed since about 1970 and provides leader training for the entire Chapter and all its entities**
  - Other chapters tend to provide leadership training and certification at the regional group level (per standard group bylaws)
  
- § **LTC responsibilities include:**
  - Conduct a twice yearly basic Leadership Training Seminar focusing on soft skills (group management, leave-no-trace, admin requirements, etc.)
  - Provide technical training in Navigation, advanced Rock and Snow skills
  - Leverage other training (e.g., Environ. Awareness by NSS)
  - Maintain provisional leader records, and archiving such records (current archives go back to 1980 or so)
  - Publish/revise Leader Reference Book
  - Recommend provisional leaders for certification by Safety Committee
  
- § **LTC members include LTC Chair, Vice Chair, Administrative Chair, Technical Chairs (Navigation, Rock, Snow), Curriculum Chair, and others**
  
- § **The current LTC Chair is Tina Bowman**

# Wilderness Training Committee Overview

- § **WTC was established in approximately 1990 as a successor to the more technical Basic Mountaineering Training Committee**
- § **The Wilderness Training Committee develops and provides a ten-week annual Wilderness Travel Course teaching participants such skills as:**
  - Basic navigation
  - Outing-focused nutrition
  - Physical conditioning
  - Equipment selection
  - Rock travel (non-technical)
  - Snow travel
  - Backpacking
- § **While there is no administrative connection between WTC and LTC (WTC graduation is not required to attain any leadership ratings), WTC training has proven advantageous to LTC candidates planning to go beyond “O” rating**
- § **The current WTC Chair is Jane Simpson**



# **Some Basics: Outing Definition, Policy Priorities, and Minimum National Leader Standards**

## When is an Activity an Outing?

- § **A Sierra Club outing is a sanctioned Sierra Club activity in which a significant component is to take participants into the out-of-doors and meets one or more of the following criteria:**
  - Group Management: It is conducted as a group activity in which participants cannot come and go as they please or on which missing persons would be the Club's responsibility.
  - Remoteness: It occurs in places where public emergency services cannot be obtained as quickly as in an urban area.
  - Responsibility for Safety: Group safety is dependent on the competent leadership and emergency performance of the leader.
  
- § **It is important when reviewing the trip to consider the three criteria above carefully. When none of the criteria is met, the trip is considered an activity. Typical activities are:**
  - Meetings held wholly indoors (but if a hike is included, it is an outing)
  - Most cruises (unless Club led hikes are included)
  - Pool parties, pub crawls, meetings, etc.

# What is the Relationship between Club and Chapter Outings Policies?

- § Chapters must always abide by all national policies/standards; but --
- § A Chapter, and an individual program, may set policies which are more stringent than the national policies. For example:
  - National policy only requires one leader on most outings (there are exceptions); Angeles Chapter (and others) require two leaders on virtually all outings
  - National does not require Wilderness First Aid to lead overnight backpacking trips. San Diego Chapter requires WFA to lead such trips
  - Generally cruises are regarded as activities. However the National Outings (NO) program treats cruises as outings. Angeles Chapter tends to do so as well.
  - LTC requires currency in CPR for provisional leaders, WTC for instructors; national does not require CPR
- § No local entity or program can set policies which are less stringent than the national policies

# Minimum National Leader Standards

- § **Minimum national standards were enacted by OAGC in 2004 and applicable to Angeles Chapter starting 1 Jan 2006. They include:**
  - Standard First Aid (SFA) -- but not CPR -- or higher: Renewal at four year intervals
    - Every other renewal can be done on-line (in-class at least once every 8 years)
    - Entities and programs may disallow on-line renewal if they choose
  - Soft skills renewal every four years (can be national “OLT-101” done on-line or in-class -- or equivalent, or higher)
  - Must show continued leadership of outings at level of certification
  - Mountaineering leaders (restricted) require WFA (also 4-yr renewal required)
  
- § **Angeles Chapter has higher standards in some instances**
  - Provisional leaders require CPR & SFA (LTC requirement)
    - Advanced rating levels (I/M/E) need WFA
    - Renewal at four year intervals per national standards
  - Wilderness Training Course leaders programs require “card currency” in SFA, CPR, and (advanced ratings) in WFA

# Leader Certification Levels: National vs. Chapter

## § National Leader Certification Levels

- Level 1: Can lead day hikes, car camps, etc -- but not backpacking trips; requires OLT-101
- Level 2: Can lead day hikes and backpacking trips; requires OLT-101/201

## § Angeles Chapter Certification Levels (see LRB for details)

- Four traditional levels (see later chart for requirements)
  - O: Lead hikes requiring minimal navigation skills, including backpacks
  - I: The above - plus hikes, on and off trail, requiring navigation skills
  - M: The above - plus “Class 3” rock and moderate snow climbs with ice axe and crampons
    - April 2008 add: M-Rock and M-Snow
  - E: The above - plus “Class 4” rock, steeper or hard-snow climbs and trips requiring advanced navigation skills
- In 2007 the O level was bifurcated as follows:
  - O-1: Corresponds to national Level 1 -- No backpack leads.
  - O-2: Corresponds to national Level 2 -- Can lead backpacks.

# Refreshing requirements

## § Requirements needing refreshing

- First Aid Requirement (FAR) - A leader must have completed a qualifying first aid course within the four years prior to the outing. CPR does not satisfy the requirement. (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.)
- Policy Update Requirement (PUR) - A leader must update their knowledge of Club and Chapter Policy through completion of OLT 101 (or equivalent) along with an Angeles Chapter Supplement.

## § There are several ways to satisfy these requirements. The materials can be studied individually or as part of a group.

- Both requirements can be refreshed online.
  - OLT at <http://clubhouse.sierraclub.org/outings/training/intro/olt101/index.asp>
  - SFA can be refreshed on line every other time
- Some entities (e.g., PVSB) have organized ARC SFA classes and invited all of their leaders
- LTC website has links to SFA and WFA class offerings
- Some entities have planning meetings (followed by potlucks...) and intend to have OLT training as part of the meeting.

## § Final requirement is Outings Chair reporting the update to the Angeles Leaders Database (Lori Ives)

# **Outings Chair Responsibilities**

# **Basic Outings Chair Characteristics from the Angeles Safety Policy**

- § **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.**
- § **Entities shall notify the OMC Chair, the Safety Chair, and the Schedule Committee of any new outings chair appointment before the new outings chair functions to approve outings for the entity.**
- § **The CHAIRS listserv shall be used to keep outings chairs well informed on matters of safety and on changes to Club and Chapter outings policies.**
- § **Outings chairs without e-mail are to provide the OMC and Safety Chairs with an e-mail address of someone who will forward CHAIRS listserv message to the outings chair.**

# Basic Outings Chair Admin Responsibilities: National Guidance

- § **Maintains current Sierra Club membership**
- § **Is familiar with the Club policies and procedures (national as well as local) that pertain to the group's outings program**
  - Policies and guidelines are distributed in the Outings Leader Handbook, the Outings Extranet, and Angeles and Entity Safety/Outings Policy
  - Ensure that leaders are aware of policies which are Chapter unique (e.g., two leaders on an outing is not a national requirement for all outings)
  - Understand the differences in Chapter and national leader rating systems
- § **Ensures Group Outings are run in accordance with Club policies and procedures**
- § **Manages and minimizes the risks of Group Outings**
  - Support Safety Committee in review of incident reports and complaint resolution;
  - be alert to situations which could put the Club at risk

# **Basic Outings Chair Admin Responsibilities: National Guidance (cont)**

- § **Maintains training and first aid certification requirements for Entity Outings Leaders and ensures all active leaders have met these requirements**
- § **Maintains communication with the Chapter Outings Chair**
- § **Maintains the outings approval process**
- § **Coordinates scheduling, planning, and publication requirements of Group Outings as required by local chapter and national policies**
- § **Works with leaders to integrate conservation issues into the outing program whenever possible**
- § **Maintains records as required by the chapter and/or national staff**
  - sign-in/waivers and publication of outings/activities for 6.5 years, etc.
  - Ensures that leader information in the database is accurate and updated
    - <http://www.angeles.sierraclub.org/leaders>
    - User name: www\chapanleaders Password: versteeg
- § **Establishes at least a nominal budget for “fee” trips, postage, phone calls, etc.**

# **More Outings Chair Guidance – Our Lessons Learned (1)**

- § **Get a good de-brief from your predecessor**
  - On your duties as OC, any lessons learned
  - Obtain the entity records and specific policies
- § **Review all proposed restricted (e.g., international) trips for compliance with Club and Chapter policies (such as approval, concessionaire agreements, etc.)**
- § **Recruit candidate new leaders and make them aware of Chapter training opportunities (LTP seminar, first aid, etc.)**
- § **Report to entity management when leader candidates have “graduated”**
- § **If needed, prepare and obtain approval for additional entity outings policies/procedures**
- § **Encourage leaders to plan and conduct outings**
- § **Help developing leaders identify suitable “mentors”**

## **More Outings Chair Guidance – Our Lessons Learned (2)**

- § **Encourage existing leaders to improve their skills (e.g., navigation) and to advance up the O-I-M-E ratings ladder, as appropriate for the entity**
  - Be generally aware of the Chapter’s requirements for attaining the various ratings (next page) and LTC training opportunities (schedule at LTC web page)
  - Encourage leaders and candidate leaders to find mentors to guide them forward.
  
- § **Work with the LTC Administrative Chair to help Provisional Leaders advance toward certifications**
  - Provisional leaders require special support (e.g., mentoring, tracking progress, selection of appropriate provisionals, choosing evaluating asst leaders, etc.)
  - Admin Chair can provide valuable support to Outings Chairs
    - Information of candidate’s record status: Is progress reported?
    - Review of planned provisional outings for suitability re Safety review
    - Recommend mentors and evaluating assistant leaders
  - The Admin Chair is an asset with lots of insight: Do use him!
  
- § **Succession planning: Always be looking for your Outings Chair replacement and mentor likely candidates.**

# Summary of Chapter Ratings Requirements (Chapters & pages refer to LRB, 16th Edition)

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

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

**O into O-1 plus O-2 updates since table was published in early 2006:**

§ LTP Seminar is equivalent to OLT-101 plus OLT-201 national soft skill training (O-1 and O-2)

§ O-2 leader's provisional trip must be a backpack; O-1 may be a day hike

# **Outings Approval: General**

# General Outings Approval Requirements

- § **All outings sponsored by an entity must be approved by the Outings Chair**
  - If the Outings Chair is unavailable for an extended period (e.g., on vacation) a qualified surrogate can be appointed to take essential actions
- § **Only the Outings Chair can submit outings for publication in the *Schedule*, newsletter, web site or any other medium**
- § **All outings are reviewed by the Safety Committee unless outings chair has “Quick-Turnaround” approval authority**
  - *Schedule of Activities* submissions are reviewed prior to publication
  - *Southern Sierran* submissions are generally not reviewed prior to publication
  - Newsletter outings are reviewed post publication
  - Generally only outings approved for publication can be posted at a web site
- § **Review includes: Leader currency (membership, first aid); leader rating vs. that of planned trip; trip plan vs. Club location advisories; policy compliance.**

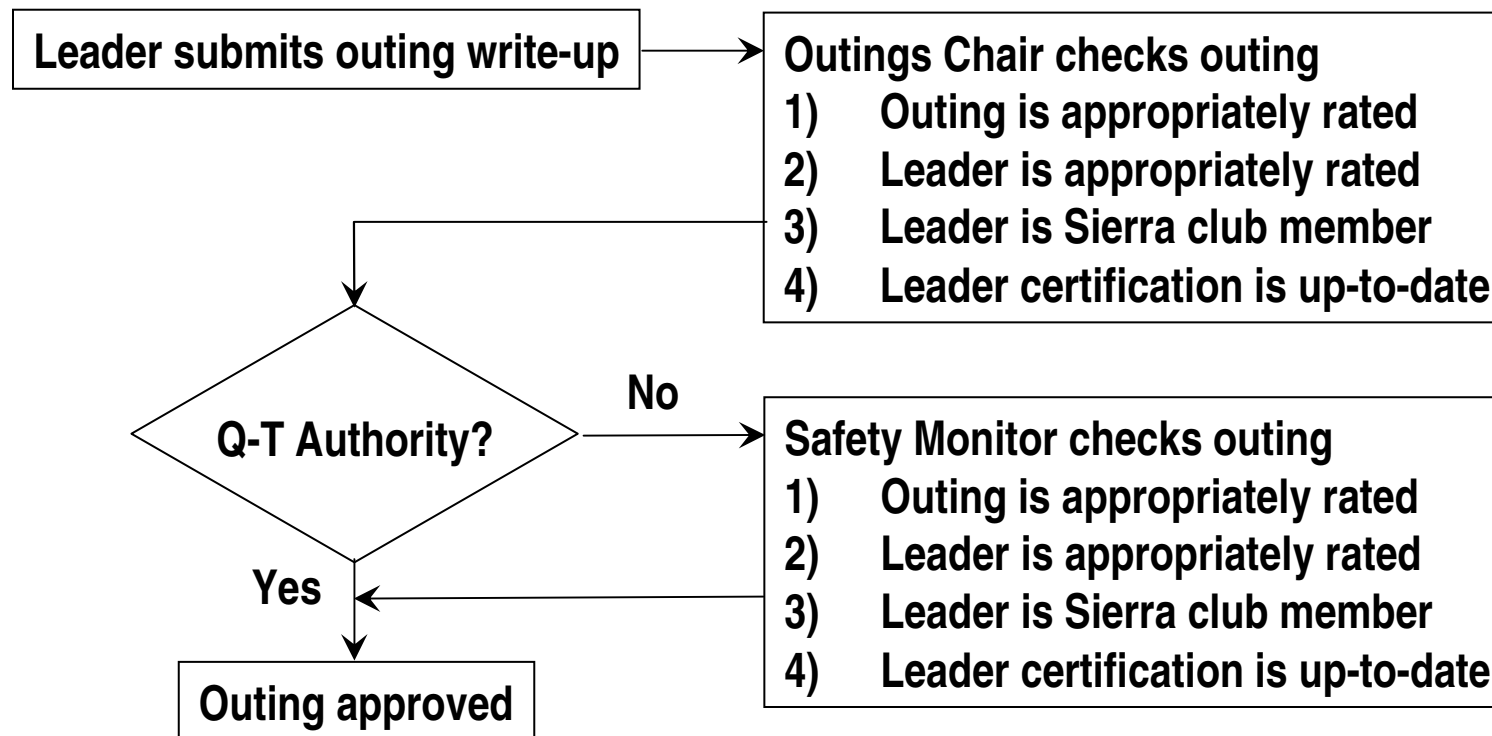
# Quick-Turnaround Approval Process

## § Safety Committee Approved Outing

- Safety review can take one month

## § Quick-Turnaround Outings Approval (established by 4/27/08 Chapter Safety Policy)

- Requires Safety Committee delegation to Outings Chair
- As quickly as Outings Chair provide review



# Application for Quick-Turnaround Authority

§ **As stated in the Policy, authorization requirements include:**

- A formal request for such authority
- Outings chair attendance at Angeles Chapter Outings Chair Training (unless waived by the Safety Chair)
- Outings chair leader rating, experience and past performance
- The character/level of the outings sponsored by the entity

§ **Formal requests must be made by the Outings Chair of a specific entity (group/section/committee aka) to the Chapter Safety Chair. The request must identify the entity, the specific classes (e.g., ratings) of trips for which such authority is requested and the reasons (advantage to the Chapter's outings program and/or the entity, etc.) such an authorization should be considered.**

§ **Applications submitted by email are preferred.**

§ **Additional information will be requested if needed**

§ **Authority, when granted, will be tailored to the situation**

# **Restricted Outings Approval**

# Restricted Outings Introduction

## § Restricted outings include

- International Outings
- Mountaineering Outings
- Watercraft Outings
- Challenge Courses
- Youth Oriented Outings: These outings present special difficulties; discuss with Local Outings Manager in national HQ before even contemplating one.

§ **If an entity sponsors trips in any of these categories, the OC should become intimately familiar with the Clubhouse policies and guidelines for such trips**

§ **For complete information see**

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

§ **Here we will discuss the first two categories, since these are relatively common to Angeles Chapter**

# National Approval of Restricted Outings

## § The following types of restricted outings require approval by the Local Outings Manager at Club HQ

- Any outing that uses a concessionaire or non-Sierra Club leaders, with or without payment, for the operation or chartering of a watercraft.
- Any outing that uses watercraft over 50 feet in length (other than regularly scheduled ferries)
- 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.
- Any outing involving a challenge course (e.g., ropes course).
- Any outing in a foreign country (or cruise to a foreign port), with the exception of Canada.
- Any outing whose primary focus is to youth under the age of 18 without the supervision of a parent or guardian.

## § When in doubt, ask.

# Local Entity International Outing Approval

- § **Chapter/Group/Section international outings require multiple levels of approval, and final approval by the Local Outings Support Committee (LOSC)**
  - First approval is by the entity Outings Chair. Many entities will also require the trip budget to be approved by their Treasurer.
  - Safety Committee approval is required before publication
  - The “Application for Group and Chapter International Outing” form must be completed and submitted to the Local Outings Manager
  - Angeles Chapter international outings must be pre-approved by the International Outing Coordinator, Donna Specht. Involving her early can smooth the overall process; she “knows the ropes”.
  
- § **Special circumstance (e.g., use of a concessionaire) can require additional forms**
  
- § **The LO international policy can be found here:**  
<http://clubhouse.sierraclub.org/outings/policy/international.asp>

# Mountaineering Outing Approval

- § **Mountaineering outings: Any outing that requires the use of ropes, runners, ice axes, or crampons (“mountaineering equipment”)**
- § **The following requirements must be met before conducting a mountaineering outing**
  - The entity must be certified to sponsor Mountaineering Outings.
  - The leader must meet the outings leader requirements for mountaineering including special first aid requirements.
  - The leader must secure an appropriately rated co-leader or assistant leader.
  - The outing must meet chapter, group, section, or national outing requirements.
  - The outing must be approved locally.
  - The specific outing must be approved by the Mountaineering Outings Committee (MOC).
  - The leader must meet post-outing requirements.
- § **For the complete set of mountaineering outing policies see:**

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



# **Financial Matters**

# Outings Pricing Policies

- § **Entities which sponsor “fee based” trips should have an explicit policy for pricing those trips, and for approval of the trip budgets (e.g., by the Outings Chair and the Treasurer)**
- § **Examples are international outings and domestic bus trips**
- § **All entities in the Club must abide by the policy imposed on the Club by the California Sellers of Travel law:**  
  
<http://clubhouse.sierraclub.org/outings/policy/CSTsummary.asp>
- § **Domestic fund raisers, or trips which are viewed by land agencies as commercial, can impose special concerns, depending on the area visited**
  - Trip leaders and Outings Chairs should understand these implications which can include
    - Special use permits (added cost and planning)
    - Advanced first aid certification (e.g., Wilderness First Responder, an 80 hr course) for all leaders

# Outings Pricing Policies (cont)

§ **The figure shows sample land agency first aid requirements on trips they regard as commercial**

- The land agency should be contacted in advance and provided details regarding the trip plan and budget
- Including entity overhead/indirect items and entity reserves in the fee calculation is likely to make the trip be seen as commercial
- Fund raising trips are commercial

§ **New Club policy on finances: “If the outing is planned to be a non commercial outing, but actually earns a significant surplus (\$25 per person or 10% of the per-person fee, whichever is greater), the entire surplus must be refunded to the participants.”**

Land Agency	Minimum Leader 1st Aid Requirement	CPR?	Date Effective	Comments
Alaska State Parks	Basic 1st Aid	Y	2006	
Alaska National Parks	Basic 1st Aid	Y	2006	
Death Valley National Park	WFR	Y	2009	Required in Backcountry Only
Grand Canyon National Park	WFR	Y	2009	All leaders and assistants must have
Inyo National Forest	WFR	Y	2009	Only Lead Guide Must Have
Yosemite National Park	Basic 1st Aid	Y	2009	
Utah BLM	Basic 1st Aid	Y	2007	
Zion National Park	WFR	Y	2009	

# **Outings Publication Options**

# Print and Electronic Media are Available

- § **The Angeles Chapter *Schedule of Activities*, published three times a year, is mailed to all Chapter members**
  - The *Schedule* reaches a large audience
  - A disadvantage is the relatively early submission deadline (lead time)
    - 1 March to 4 July, deadline 10 Nov to Schedule Editor
    - 5 July to 31 Oct, deadline 10 Mar to Schedule Editor
    - 1 Nov to 28 Feb, deadline 10 July to Schedule Editor
- § **Many entities distribute a periodic newsletter to all their members**
  - Newsletters reach a smaller, more focused audience (sometimes desirable)
  - Lead times are generally shorter than that of the *Schedule*
- § **The monthly *Southern Sierran* offers publication opportunities**
  - Generally the shortest print publishing lead time
  - Reaches entire Chapter membership
  - Priorities given to “high value” outings (e.g., Chapter fundraisers)
- § **The Chapter and many entities provide timely outings information at web sites**
  - Convenient for those with computers
  - Generally subject to same approval requirements as print media

## **Publication Requirements for Co-Sponsored Trips**

- § **On co-sponsored trips, the primary sponsor is listed first in ALL publications. The primary sponsor is the entity which will take responsibility for any incident investigation.**
- § **Outings Chairs should ensure that their entity newsletter editor understands that write-ups are approved as written. If re-written, write-up should be re-approved.**
- § **No entity publication should publish the name of another entity as co-sponsor until the other sponsor has approved the outing.**
  - Verifying approval by the other sponsor is part of the OC's job.
  - If approval by co-sponsor cannot be approved before entity publication deadline, the name of the co-sponsor should be deleted and should not appear in the publication.
- § **For co-sponsored outings, the original of forms is to be retained by the primary sponsor with a copy to be retained by each secondary co-sponsor.**



## **Problem Behaviors (Participants & Leaders)**

# Problem Behaviors: Overview

§ Sierra Club Problem Behavior guidelines can be found here:

<http://clubhouse.sierraclub.org/outings/common/incidents/problem.asp>

§ Local Outings Complaint Resolution guidelines are here:

[http://clubhouse.sierraclub.org/outings/GCO/Chair/complaint\\_procedure.asp](http://clubhouse.sierraclub.org/outings/GCO/Chair/complaint_procedure.asp)

§ The above guidelines focus on complaint resolution by entity Outings Chairs. The process in Angeles Chapter is somewhat different, with the Safety Committee playing a central role.

- Outings Chairs should fully understand the material at the above web pages
- They should be prepared to support the Safety Committee in any required incident investigation related to outings their entity sponsors or co-sponsors

§ On rare occasions (“**Serious Incidents**” -- death, serious injury or criminal/civil legal action is likely) the investigation will be conducted by the national office, with support from the Safety Committee and Outings Chair. More on this later: “**Serious Incident Procedure**”

§ Sexual harassment complaints are addressed by Chapter Sexual Harassment Investigating Committee

# Sierra Club Problem Participant Guidelines

## § Behavior identification and response (leader action on outing)

- Identify inappropriate behavior and address it immediately
- Take the participant aside: Explain and discuss the behavior, its effect of the group, the need for change, and consequences if not changed
- Bring the participant back to the group with a sense of purpose (give them a task)

## § Consequences on the outing

- If all efforts fail, the leader has the authority to remove the participant from the outing
- Ideally, do not let the participant leave the outing alone
  - If the participant insists on leaving alone, get him to sign out and have witnesses to his insistence
  - If the participant is unwilling to leave, and no escort is available, it may be necessary to let the person remain with the group; location and other circumstances will affect leader's options and decisions.

# Sierra Club Problem Participant Guidelines (cont)

## § If the leader feels threatened, he or she should

- Try to diffuse the situation
- Use peer pressure to help manage the situation
- Decide to continue or end the outing
- Consider documenting everything; get witness statements
- Write an incident report

## § After the outing (Outings Chair actions)

- Have someone other than the leader discuss the situation with participant
- Fact finding (Outings Chair and/or Safety Committee investigator)
  - Call the leader and get facts about the incident, outing and participant
  - Discuss with problem participant and others on outing
  - Document the results

# Sierra Club Problem Participant Guidelines (cont)

## § After the outing (continued)

- Consider revoking participant's privilege to participate in future entity outings, if the facts warrant such an extreme action
  - ExCom must inform participant of restriction in writing (web site has sample letters)
  - Restriction should be of appropriate duration and have specific end date
  - Participant should be given action steps for restoration of privilege
  - Participant should be informed of appeal approach
- Participant appeal process
  - There must be an avenue of appeal for all such decisions
  - In Angeles Chapter this has traditionally been the Safety Committee
  - If the outcome of this appeal is unsatisfactory, a further appeal may be made to the Outings Management Committee

# Sierra Club Problem Leader Guidelines

- § **Actions will generally be in response to a participant complaint**
  - Complaint may come to entity Leader, Outings Chair, or Safety Chair
  - Occasionally complaints are sent to Local Outings Manager at HQ
- § **Chapter Safety Committee member will generally lead investigation, with Outings Chair support. “*Serious Incidents*” require special treatment (later chart). Harassment claims also require special treatment.**
- § **Investigation Process: Initial Data Gathering**
  - Contact the complainant and inform him or her about the investigation process. Gather information such as history with Club, length of membership, frequency and types of outings attended and other relevant history. Discuss the facts of the complaint.
  - Contact the leader and let him or her know that a complaint has been lodged. Get the facts from the leader’s perspective
  - Contact other participants, if the situation warrants it, to get additional input on the details of the situation or leader’s actions leading to the complaint

# **Sierra Club Problem Leader Guidelines (cont)**

## **(see earlier web page for further detail)**

### **§ Investigation Process: Consider Possible Causes**

- Complainant was a problem participant, or has a history of complaints
- Leader set unrealistic expectations, or did not make expectations clear
- Logistical issues
  - Not within control of leader (weather, trail conditions, etc.)
  - Within control of leader (poor planning such as no first aid kit, inadequate scouting, poor choice of lodging, etc.)
- Outings leader conduct was not professional or otherwise personally inappropriate
- Leader conduct was not safe (poor choice of routes, etc.)
- Inadequate or improper screening of participants by leader

# Sierra Club Problem Leader Guidelines (cont)

## § Determine and Implement Appropriate Actions

- If cause was a problem participant, take actions discussed earlier
- If participant was not suited to this outing (e.g., a screening issue), recommend more appropriate outings to him or her, and counsel the leader on proper screening procedures
- If leader was substantially at fault, consider suspending his or her leadership privileges for a specified period (the entity ExCom can take this action with regard to trips they sponsor or the Safety Committee can do so with regard to all Chapter sponsored outings)
  - Notify leader in writing and identify avenue for appeal (Safety Committee or Outings Management Committee)
    - Notify Safety Chair of suspension decision and rationale
  - Identify any steps required for reinstatement (for example, retraining or additional training)
  - Review status at end of specified period (entity or Safety Committee)

# Serious Incident Procedure

<http://clubhouse.sierraclub.org/outings/policy/serious-incidents.aspx>

## § A Serious Incident involves one or more of the following

- Participant or leader dies or experiences a permanent life-altering injury
- There is reason to expect civil litigation against leader and/or Club
- There is reason to expect criminal charges against leader(s) or participant(s)

## § Serious Incident Procedure

- All leaders temporarily suspended from leading all future outings
- Sponsoring entity will inform Chapter Safety Chair and Club Director of Outdoor Activities and request an investigation
- Director of OA will conduct investigation and report to OAGC no later than ten days after receipt of incident report at national headquarters
- OAGC will report its findings to the suspending entity

§ In most cases (e.g., death by natural causes) the suspension will be lifted after a few days

§ There are very rare cases where suspension will be continued pending more detailed investigation

# **The Angeles Chapter Outings Assembly (COA)**

## **Chapter Outings Assembly (COA)**

- § **Annual COA established by Outings Governance Policy in 2003 to**
  - Celebrate achievements
  - Set goals
  - Conduct training
  - Review policies and propose changes
  - Designate Outings Representatives to serve on OMC (5), Safety Committee (1) and LTC (1)
  
- § **Chapter entities which conduct outings may be represented by their Outings Chair, or a designated alternate delegate, with one vote per entity**
  - The quorum is a majority of the delegates registered in attendance
  
- § **The COA is Chaired by the Chapter OMC Chair**
  
- § **National staff and committee members may be invited as guests**
  
- § **The COA is held in late October or early November (date selected to minimize conflict with related Chapter and/or national events)**

**Questions (if any) and Answers (if possible)**