

Outings Leader Training - Basic (OLT 101)

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Introduction

The Sierra Club Outings Leader Training-Basic (OLT 101) handout is a reference for all Club outing leaders. It provides background on the Sierra Club and its Outdoor Activities program, and provides guidance for planning and conducting Sierra Club Outings.

Procedures and policies listed within OLT 101 apply to all Sierra Club Outings programs unless otherwise noted. These procedures and policies are not meant to supplant more stringent entity-specific practices. Always ask your outings chair for the proper protocol if there are differences between these procedures and policies and those of your outings entity.

If you would like to integrate OLT 101 into your entity's existing training, the [OLT 101 Teaching Plan](#) and [Role Plays](#) are very useful tools to facilitate this.

This information is available on the Outing Leader Extranet. The extranet is the most comprehensive resource for Sierra Club outing leaders. You can also find links to all the online resources mentioned in this document at <http://clubhouse.sierraclub.org/outings>

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I. Overview of structure

A. Structure

1. Club structure

The Sierra Club is a representative democracy. The Board of Directors and the Chapter/Group Executive Committees are elected bodies that set broad policy and priorities as well as appoint volunteer committees that implement the Club's programs. Club staff provide support for the Club's programs and goals.

Most of the Sierra Club's key programs are delivered through chapters and groups. The Club's funding mechanisms ensure that chapters and groups can offer a common set of program opportunities. Chapters and groups strive to make those opportunities available to every member.

The Board of Directors works with the broader Club leadership through the six governance committees listed below (commonly called "GovComs"):

- 1. Communication and Education: Oversees communication, publishing, media, and education strategies.
- 2. Conservation: Oversees conservation programs nationally and regionally.
- 3. Finance: Oversees financial management of national entities.

4. Organizational Effectiveness. Sets internal policies and procedures to enhance Club effectiveness.
5. Training: Oversees nationally conducted training budgets and activities.
6. Outdoor Activities: Provides oversight and guidance for all outdoor activities conducted by the Club.

The Sierra Club seeks a culture of cooperation and civility. We want the volunteer and staff experience to be positive, supportive, and rewarding. Visit the [Sierra Club Leadership Structure](#) page to learn more.

2. Outdoor Activities structure

The Outdoor Activities Governance Committee (OAGC) carries out planning, recommends priorities, and establishes and oversees program performance with the goal of maintaining and enhancing 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.

The following are the major outdoor activity programs, each with an OAGC subcommittee that oversees operations. All outings are led by volunteer leaders. Click here for an [program overview](#) and below for program fact sheets.:

- [Local Outings](#) (group and chapter Outings) - 20,000 chapter, group and section outings serving approximately 200,000 participants annually.
- [National Outings](#) - 350 paid outings serving 4,000 participants annually.
- [Inner City Outings](#) - 1,000 outings in 49 ICO groups serving approximately 14,000 youth annually.
- [Lodges and Huts](#) - Clair Tappaan Lodge and four backcountry huts (Benson, Bradley, Peter Grubb, and Ludlow) providing accommodations for 10,000 annually in the Donner Pass area of the Sierra. Note that several other lodges and huts are operated by California chapters.

The OAGC has established several other committees to provide cross-program support:

- [Mountaineering Oversight Committee](#) (MOC)
- [Outdoor Activities Training Committee](#) (OATC)
- [Medical Advisory Committee](#) (MAC)

Check out the [Outdoor Activities Volunteer Organization Flowchart](#) to see how all these committees work together.

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B. Outdoor Activities mission and goals

Mission:

To connect all people with the natural world and with the Club by maintaining an enhancing diversified, superior, volunteer-run outdoor activities that support the Club's conservation mission.

Goals:

1. Reach out to new constituencies.
2. Champion conservation campaigns through outdoor activities.
3. Recruit, develop, and retain qualified leaders.

Learn more about [OAGC Goals](#).

C. History of outings

John Muir's advice to "climb the mountains and get their good tidings" has been followed by Sierra Club members since the Club's founding on May 28, 1892, and has played a key role in shaping the Club's history. As the Club's first president, Muir reasoned that "if people in general could be got into the woods, even for once, to hear the trees speak for themselves, all difficulties in the way of forest preservation would vanish." In fact, as early as 1890, before the founding of the Sierra Club, early conservationists worked to establish Yosemite National Park. Shortly after its founding, the Club had its first campaign success: defeating a proposal to reduce Yosemite National Park's boundaries.

In 1901, the Club's Board of Directors proposed an annual summer outing. Its purpose was to encourage members and other interested people to see firsthand the country the Club sought to preserve and protect. William Colby, who led these outings for 29 years, noted that "an excursion of this sort, if properly conducted, will do an infinite amount of good toward awakening the proper kind of interest in the forests and other natural features of our mountains, and will also tend to create a spirit of good fellowship among our members."

The first outing, which drew 96 people to Tuolumne Meadows in 1901, was the model for what came to be called the High Trip. Nearly every summer for more than fifty years, groups numbering up to 200, were taken into the wilderness by the Club. In the 1950s, the impact of such large numbers of people became a matter of concern, and in the 1960s the High Trip tradition passed into history.

From a charter group of 182 California mountaineers, naturalists, and educators, the Club grew dramatically during its first century to more than 700,000 members. It now consists of 65 chapters and almost 400 regional groups in the United States and Canada. Today, local outings range from strolls on the beach to Inner City Outings for disadvantaged youth, from trail maintenance to white water canoeing, from potluck socials to backpacking trips. Indeed, the variety of outings ranges as widely as the interests and creativity of Club members. Outings allow members (following Muir's advice) to introduce others to sensitive and endangered areas that need protection. Always, they aim to be safe, fun, and inspirational for all!

Check out the following resources to learn more about the Sierra Club and its history:

- [Sierra Club Outings History Slideshow](#)
- *Sierra Club, 100 Years of Protecting Nature* by Tom Turner (Abrams), 1991
- *The Sierra Club, A Guide* by Patrick Carr (Sierra Club Books), 1989
- *The History of the Sierra Club, 1892-1970* by Michael P. Cohen (Sierra Club Books), 1988
- *Voices for the Earth: A Treasury of the Sierra Club Bulletin* edited by Ann Gilliam (Sierra Club Books), 1979
- *John Muir and the Sierra Club: The Battle for Yosemite* by Holway R. Jones (Sierra Club Books), 1965

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D. Conservation

Conservation continues to be an important part of Sierra Club outings, even though our goals are now much broader than saving the Sierra Nevada. Many of the Club's positions are opposed by well-organized and

well-heeled opponents. The Club neutralizes these forces by enlisting people at the grassroots to fight the battles. Outing leaders do much by guiding their participants into the woods and waiting for the magic of the outdoors to take effect. Although this works a surprising amount of the time we are often more effective when we guide people toward actions that can change the world.

Three things define Sierra Club members: We are inspired by the wilderness, we take responsibility for the world around us, and we believe that we can make a difference. By itself, wilderness can take care of only the first part. It is up to us as leaders to help with the second and third parts. We do this by sharing with outings participants how the Club is working to preserve our environment, by telling them what the Club has accomplished in the past, by showing them the differences the Club has made, and by helping them see the conservation opportunities for them within the Club.

Of course, this doesn't mean that we need to be confrontational or adversarial, or that we should resort to a high-pressure sales pitch. Wilderness only needs our help in getting the message across.

One of the Club's key conservation-in-outings initiatives is called Outdoor Outreach. Outdoor Outreach is designed to help outings leaders bring a conservation and educational element to outings. It does this by providing handout-type materials and one-on-one guidance to outings leaders. Check out the [Outdoor Outreach](#) website to find out how you can include conservation in your outings.

- The [Outdoor Outreach Guide for Outings Leaders](#) brochure has a number of suggestions for integrating conservation themes on outings.
- The [Invitation to Advocacy](#) brochure suggests a number of options for joining in the Sierra Club's conservation efforts, depending on how much time and commitment a person can afford. Even if you do nothing else to promote conservation activities, you should hand out this brochure, which concisely outlines the different ways that participants can become more involved.

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II. Outings leader requirements

The following requirements apply to all Sierra Club outings leaders. Individual Club entities may have additional requirements for their leaders.

1. Be a Sierra Club member.
2. Be at least 18 years of age.
3. Have [First Aid certification](#) equivalent to or higher than American Red Cross Basic.
(Face-to-face trainings are recommended due to their interactive nature. However, you may consider using a web-based first aid course as a renewal for an existing face-to-face basic first aid class, alternating each renewal cycle with a face-to-face training. [Click here to learn more.](#))
4. Complete the Outings Leader Training - Basic ("OLT 101") or comparable training from local outings Entity. If OLT 101 is not available, then the leader must complete the OLT 101 curriculum on his or her own.
5. Have outing participant skills appropriate for the activities of the trip towards the advanced end of the scale.
6. Provisionally Lead at least one outing and receive a positive

evaluation by the Mentor Leader.

7. Receive approval to lead outings from the Outing Chair or delegated authority of the Entity sponsoring the outing.

In addition the leader of an outing that includes an overnight stay away from cars (Level 2) **must**...

1. Successfully complete the [Outings Leader Training Workshop](#) (which includes OLT 101 and OLT 201) or comparable [OLT 201 training](#) from local outings Entity. If participation in OLT 201 cannot be arranged, then the leader must complete the following portion of the OLT 201 curriculum on his or her own: Safety Management Planning, Trip Planning, Interpersonal Leadership, and Group Management (effective on September 1, 2006).
2. Provisionally Lead at least one outing that includes an overnight stay away from cars and receive a positive evaluation by the Mentor Leader.

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III. Planning an outing

A. Concept

1. Purpose:

Define the purpose of your outing. The purpose could be to enjoy the outdoors, focus on conservation, teach an outdoor skill, or participate in something else of interest to you or your participants.

2. Outing, participant and leadership profile:

Define your outing profile by deciding on a location, the type of outing (e.g. backpacking, day hiking, kayaking), how rigorous the outing will be, and how long it will last. Remember: Leaders generally move faster than participants. Add time for unforeseen delays (environmental and human), breaks, hydration stops, and elevation gain/loss.

Define your participant profile by estimating how many participants can safely participate, whether they need special outdoor skills or experience, and whether your outing will include minors.

- Will your outing be strenuous or more leisurely? Do you want to take beginners or only seasoned participants?
- Will you have any unaccompanied minors on your outing? If so, they will need their parent or guardian to sign a waiver and a Minor Medical Treatment Authorization form. ICO has waivers that include both.

Define your leadership profile by deciding how many leaders you'll have, what the leader roles will be, and whether you will need any special experience, conditioning, or equipment.

B. Approval

1. Entity approval:

Present the outing concept to your Outings Chair and follow the Chair's instructions to obtain authorization.

2. Restricted outing approval:

Restricted outings must be approved by the Regional Outings Department. See [Restricted Outings](#) for policy details.

Certain categories of outings have special rules because of the Sierra Club's insurance policy. The restricted outings categories are:

- Mountaineering and rock climbing
- Certain watercraft outings
- Challenge courses (e.g., High and Low Ropes courses)
- International outings
- Youth Oriented Outings
- Outings using a concessionaire. See [Use of Third Party Services](#)

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C. Location and route

1. Route considerations:

Become familiar with your route and its location. When considering the route you'd like to take, keep your outing and participant profile in mind. Also, check for location advisories or restrictions that might be associated with the area. Location advisories are areas established by local entities to either prevent outings to an area that is overused or politically sensitive or to encourage outings to an area to raise awareness of local conservation issues. See [Exchange of Conservation Information](#) for location advisory details.

2. Scouting:

It is a good idea to scout the route and look for hazards as well as good places to take breaks, eat lunch, and interesting vistas. If scouting is not feasible, you can use maps, guidebooks, other leaders, local sources, and other resources to obtain as much information as you can prior to the outing. Still, it's always best if you can scout your route to reduce the likelihood of unforeseen circumstances as well as aid in emergency action and preparedness. While scouting a route:

- Take notes-write down the location and travel time to every possible campsite, water source, alternate route, and escape route, rather than just noting your intended sites and routes.
- Consider environmental impact-what effect will your larger actual outing group have on the terrain and the environment compared to your smaller scouting "group?"
- Consider aesthetic values-where are the best vistas?
- The psychological effect of the sequence of sites and events is important as well-where are the difficult portions? Do they come early or late in the trip? Are they adequately balanced with rest periods?

3. Group size:

Determine the legal and appropriate outing group size by considering the following:

- The ability of the leader or leaders to safely and enjoyably manage a group in this terrain for this type of activity.
- Land agency restrictions.
- The environmental impact of your group size.

4. Route change considerations

When considering any changes to the route you have planned, either before or during the outing, be sure to consider the impact of these changes on the difficulty of your trip, participant expectations, and your safety management plan/emergency response plan. If a route change materially affects the difficulty of the outing, participants must be notified, further screening/discussion should be considered, and the safety management plan/emergency response plan should be re-examined.

5. Permits and charges:

Permits: Make sure to always obtain the required permits. If fees are charged for an outing in addition to actual direct costs, there is a significant likelihood that a special-use permit may be required.

Examples of actual direct costs include transportation to the trailhead and food; examples of indirect costs generally necessitating a special-use permit are publicity, insurance, and equipment depreciation. Contact the land-management agency (National Park Service, State Park, Forest Service, Bureau of Land Management, etc) to find out whether your outing requires a commercial permit in addition to a standard wilderness permit. To learn more about permitting, visit the [Permit Information](#) page.

Charges: As a leader, you should calculate any outings costs and plan how they will be paid by participants. Be sure to communicate any outings fees to participants before the outing. To learn more, visit the [Charges for Outings](#) page. If you are planning to fundraise with your outing, visit [Fundraising Outings](#).

6. Transportation:

Consider the following as you make transportation plans:

- Where is the meeting place?
- How will the group get to the trailhead/put-in/etc.?
- Will carpools be used or vehicles rented? (**Important:** See [Transportation](#) and the [Transportation FAQ](#) for rules and restrictions on carpooling and car rentals, as well as for information on special discounts with the Club's preferred rental car provider.)

7. Individual leader roles and responsibilities:

All outings that involve group travel should have someone designated as "point" and as "sweep." Either an outings leader or a capable and trustworthy participant can be designated point or sweep. The point keeps track of the route and sets an appropriate pace. The sweep brings up the rear and ensures that no participant is left behind.

It is a good idea for the point and sweep to carry a method of emergency communication, such as whistles. Also, make sure the sweep is carrying a first aid kit to ensure that resources are quickly available in the event of an injury.

Count, count, count your outing participants throughout the day.

8. Trail etiquette and protocol:

Make sure leaders and participants understand these points before the outing begins:

- The point is always in front; the sweep is always at the rear.
- The point or sweep should immediately notify the leader (if leader not point or sweep) when someone insists on going forward or staying behind.
- Always stop at trail junctions and either wait for the rest of the group or, less preferably, ensure that the group member behind you knows which way to go.
- Assemble the entire group at least every 1 to 1.5 hours.
- Keep the trail clear when stopping for breaks.
- When "nature calls," inform another group member or leave your pack near the trail so that the sweep will not leave you behind.
- Stay on the trail and never cut switchbacks.

9. Participant management on base camp outings, during layover days or outings with significant free time:

Communicate base camp rules and boundaries to participants. Screen participants' plan and assess the reasonableness of the activity before granting permission.

- Activities beyond camp boundaries require leader permission.
- At least two people are required for any activity beyond camp boundaries.
- All activities should have a planned itinerary and time frame known

to the leader.

To learn more about how to manage free days on your outing, check out the [Free Day FAQ](#).

10. Group gear/extra leader supplies:

There are many variations of the "essential" items to carry depending on the outing and the environment. Listed below are the concept-based "Ten Essentials" as adapted from "The Mountaineers." Here is a good starting list that a leader should consider bringing:

- Navigation (map and compass)
- Fire (matches or lighters)
- Signaling Device (whistle or mirror)
- Sun Protection (sunglasses and sunblock)
- Insulation (extra clothing)
- Nutrition (extra food)
- Hydration (extra water and/or the means to make more)
- Illumination (flashlight/headlamp)
- First Aid Kit
- Emergency Shelter (trash bag, bivy sack, tent)
- Bonus: Repair Kit including tools

Leaders should bring a first aid kit on their outings. A kit should include all the items necessary to address common wilderness based emergencies such as wound management. For first aid kit information, see [First Aid Kit Contents](#).

The Sierra Club [Prescription Medicine on Outings](#) policy allows one prescription medication to be brought on outings by the leader: Epinephrine on adult outings. To learn more about the Certification to Carry Epinephrine and Anaphylaxis Protocol (which leaders who choose to carry epinephrine must follow), visit the [Sierra Club Medical Protocols](#) page.

11. Communicate food and water needs to your participants:

Make sure everybody knows whether they're responsible for bringing their own meals or whether meals are provided/shared. If meals are provided or shared, be sure to ask about dietary restrictions. When planning your route, ensure there is sufficient water along the trail. If there isn't, make sure that participants carry enough water.

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D. Safety management planning

Safety planning isn't just a task you check off on your "leadership checklist." Safety management is a state of mind and should be infused throughout the planning process for your outing. You also need to make them aware of any risks associated with the outing. Good trip planning and anticipating potential incidents is the best way to prevent an emergency.

1. Information to consider collecting:

- **Hospitals**-note the locations of hospitals and how to get there.
- **Ranger stations**-note the locations of ranger stations and find out if/when they are staffed.
- **Phones**-note the locations of nearby pay phones and determine whether cell phones work reliably in the area. It is generally not a good idea to rely solely on cell phones as a critical part of your safety management plan/emergency response plan.
- **Search and rescue**-note the contact information for the relevant provider of this service (e.g., Park Ranger Station) and, most importantly, find out under what circumstances they will provide assistance and evacuation.

2. Emergency contact information and participant medical forms:

Emergency contact information should be obtained from outings participants before the outing begins (the [Sign-in Sheet and Liability Waiver](#) includes a column for this). For overnight/multi-day outings and more rigorous activities, both participants and leaders should consider filling out [Medical forms](#) to help in the pre-trip screening process. Leaders should then carry the completed medical forms with them in the field (Medical forms aren't necessary for most day hikes.) Visit the "[How to Use the Medical Form](#)" page to learn how to ask open-ended medical questions.

3. Safety Management/Emergency Response Plan:

On overnight wilderness outings, leaders should consider completing a [Safety Management/Emergency Response Plan](#) before the outing begins. This plan includes the outing itinerary, emergency resources and contingency/evacuation plans. One copy should stay with the leader in the field, and one copy of this plan should stay with the entity sponsoring the outing (e.g., the Group Outings Chair), family member or friend.

4. Trip Type-Specific Considerations

There are several different trip types that may have additional risks to consider in your safety management planning:

- **Watercraft outings:** To learn more, check out the [Watercraft Policy](#) and [Watercraft FAQ](#) pages.
- **Mountaineering or climbing outings** (using ropes, carabiners or ice-axes): Visit the [Mountaineering Extranet](#) and [Mountaineering FAQ](#) page to learn more.
- **Service outings including tool use:** Visit the [Tool Use on Outings FAQ](#) to learn more.

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E. Publicity

1. Publicize the outing:

All Sierra Club outings should be publicized. Your Outings Chair can provide you with publicity guidelines.

2. Outing announcement:

The outing announcement should be as unambiguous as possible and should contain the following information:

- The outing date and cost, if any
- A brief description of the outing and destination
- The difficulty rating in unambiguous terms (if your entity has a rating convention, use it)
- Any prerequisites for participants (such as experience, conditioning, and specific skills)
- The leader's name and phone number or email address (so potential participants can ask questions before the outing)

3. Liability waiver:

Wherever outings are publicized, there should be a notice that advises potential participants of the need to sign a liability waiver (most local entity newsletters already include this statement). See [Liability Waiver FAQ](#) for more details.

F. Pre-outing communication

Prior to the outing, make yourself available for questions. You can do this by listing a phone number or email address in your outing announcement or by establishing a time and date to hold a pre-outing meeting. Your goal should be to ensure that potential participants understand what the

outing will be like and how they should prepare. For certain outings, you may also want to provide a brochure or equipment list. When you talk with potential participants, remind them of the requirement to sign a waiver. If an unaccompanied minor wants to participate in your outing, you will need a liability waiver and [Minor Medical Treatment and Authorization](#) signed by a parent or guardian.

1. Screening:

Pre-outing communication can also give the leader an opportunity to screen potential participants whether they are appropriate for the outing. Potential participants should be screened on the basis of group and individual safety. Participant screening can be done in advance or even when you meet at the trailhead. A leader may use the following criteria to screen participants and guide them to a more appropriate outing if necessary:

- **Fitness** - Participants should be physically (conditioning and stamina) and medically fit enough to enjoy the outing and not compromise their or the group's safety.
- **Experience** - Participants should have the technical expertise appropriate for the type of outing, such as off-trail travel, climbing, or whitewater paddling skills.
- **Equipment** - Participants should also have the necessary equipment to participate in the outing safely, such as food and water, sturdy footwear, or a personal floatation device.

2. Screening and the Americans with Disabilities Act (ADA):

If a potential participant has a disability, there are additional criteria that must be considered according to the Americans with Disabilities Act (ADA):

- **Reasonable Accommodation** - Can the person take part on the outing without the Club incurring excessive cost or effort to allow participation?
- **Safety** - Can the person take part on the outing without endangering their own safety or the safety of others?
- **Fundamentally Alter the Nature of the Activity** - Can the person take part on the outing without fundamentally changing the nature of the activity?

See [Participant Screening](#) for more information.

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IV. Conducting an outing

A. Forms

1. Waivers

All outings participants must sign a liability waiver

All outings participants must sign a liability waiver prior to participation on any Sierra Club outing. [Sign-in Sheet Liability Waivers](#) are easier to keep track of than individual waivers. However, individual waiver forms are available and may be sent during pre-trip correspondence (usually used for longer outings).

For the rare cases in which waivers are prohibited by government land agency regulation, all participants must sign an [Acknowledgement of Risk Form](#) in place of a liability waiver. See [Liability Waivers and Acknowledgement of Risk Descriptions](#) for more information.

The [Sign-in Sheet and Liability Waiver](#) helps inform participants of the inherent risks of outdoor activities and provides legal protection for both you and the Sierra Club.

2. Minor Releases

If unaccompanied minors are on your outing, the parent or guardian must complete the [Minor Medical Treatment Authorization](#) form in addition to the above liability waiver.

All the forms and waivers can be downloaded from the [Forms Page](#).

B. Transportation

1. Carpooling:

Carpooling is defined here as the use of participant-owned vehicles, or a combination of participant-owned and leader-owned vehicles, for transportation to, from, and during Sierra Club outings. On such outings, the outing officially begins at the trailhead. *Carpool transportation is at the sole risk of the participants*, both driver and passengers, even if they are the leaders or staff of the outing or activity. If carpooling is to occur, the *leader is responsible for ensuring all of the following*:

- **Participants are advised in advance that the Club assumes no responsibility for carpools.**
- **Leaders must not assign which cars participants ride in.**
Leaders must limit their involvement to making participants aware of who needs, and who is offering, rides. (This precaution limits exposure to liability as a result of carpooling activity.)
- To learn more about specific transportation information, visit the [Transportation](#) and [Transportation FAQ](#) page to learn more.

2. Club-provided transportation:

If transportation is part of the outing, such as a bus trip or leader-arranged transportation, there are special rules that apply. See the [Transportation](#) page for an overview on [Insurance](#) or contact the [Local Outings Manager](#) for more information.

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C. Trailhead talk

All Sierra Club outings should begin with some kind of a trailhead talk where an outings leader welcomes the participants, sets the outing expectations and tone and provides the opportunity to answer any questions. In addition, the leader may explain trail conduct, safety issues, have waivers signed, introduce a conservation topic, and mention any other relevant topics.

The portable, laminated [Trailhead Talk](#) card helps you organize the information to be communicated to outings participants at the beginning of the outing. Though all of the trailhead talk topics may not be relevant for your particular outing, consider using this card as a basis for your next talk. Laminated copies can be ordered using the online [Materials Order Form](#).

D. Leave No Trace/Outdoor ethics

Leave No Trace/Outdoor ethics is an approach for responsible use of the outdoors that minimizes the impact of outdoor activities. The main principles are:

- Plan ahead and prepare.
- Travel and camp on durable surfaces.
- Dispose of waste properly.
- Leave what you find.

- Minimize campfire impacts.
- Respect wildlife.
- Be considerate of other visitors.

The portable, laminated [Leave No Trace](#) card outlines the key concepts of minimal impact outdoor ethics. Laminated copies can be ordered using the online [Materials Order Form](#).

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E. Emergency response

1. Scene management:

- **Get calm and stay calm**
 - Calm yourself down before entering an emergency scene
 - Your calm will spread to others, including your patient
- **Establish or maintain leadership roles:**
 - Every emergency scene should have a **primary leader** and **first aid leader**.
 - The **primary leader** generally does not administer first aid but rather addresses the needs and safety of the entire group, manages resources, and coordinates evacuation plans
 - The **first aid leader** tends to the medical needs of the injured patient(s), although the first aid leader may be supervising the delivery of first aid administered by others.
- **Survey the scene** before rushing in, protect yourself and your group members, and don't create more injuries:
 - Is the scene safe?
 - What happened?
 - How many injured people are there?
 - Can bystanders help?

A laminated [Emergency Response Card](#) can walk you through the steps of an emergency. Laminated copies can be ordered using the online [Materials Order Form](#).

2. Patient care and evacuation plan:

All leaders must have first aid certification equivalent to or higher than American Red Cross Basic. In addition to this minimum, leaders must obtain the additional first aid training required by their outings entity for the type of outings they lead.

An [Emergency Response - Patient Report](#) form will guide you through a detailed patient assessment, help you document the patient care you have provided and help you plan an evacuation.

3. Who to call:

When your group is able to communicate with the outside world, contact the authorities you feel are appropriate:

- Front country emergencies (less than one hour from help): Contact the local Emergency Medical System (e.g., 911).
- Backcountry emergencies (greater than one hour from help): Contact the local search and rescue team (from the information in your safety management plan/emergency response plan), as well as the Emergency Medical System.

4. Life-threatening emergencies or fatalities:

As soon as possible, contact the Sierra Club Outings Department at: **1-888-OUTINGS** (888-688-4647).

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F. On-Outing Issues

1. Unfit or ill-equipped participants at the trailhead:

When faced at the trailhead with an unfit participant, consider asking these questions to determine whether this outing is a good fit for them physically. Here are some open-ended questions to help determine a participant's conditioning/stamina:

- What is your hiking (rafting, backpacking, skiing, etc) experience?
- How often do you do this activity (if never, what sort of exercise do you do to stay fit?)
- Have you done a hike of this length and duration before?
- How is your general physical condition? If you have any allergies or major injuries in the past, please come talk with me after the trailhead talk.

Here are some questions to help ensure that participants have the appropriate equipment for the activity (and not too much). Use your creativity to describe to newer participants the value of and the reasons for appropriate footwear, raingear, etc.

- I see you are here in sandals/tennis shoes; have you done a similar hike with them before? Can you describe the last trip where you used these and how they functioned?
- Did everyone remember to pack food, water, etc (10 essentials list)?
- Have you used this backpack (boots, tent, sleeping bag, etc) on an outing like this before, under what conditions, and how did it work for you?
- Are you used to carrying this much/little in your pack?

As a leader, it is best to get the participant invested in screening themselves off an outing. The leader is to paint the real expectations of the outing and how the participant's fitness/equipment may prevent them from having a safe and enjoyable outing.

- "Generally this outing is more appropriate for people who are able to hike longer distances (for a longer time, at high elevations, in inclement conditions)."
- "I'm concerned that this outing may be too long (hard, strenuous, etc) for you, and won't be enjoyable."
- "Though this hike doesn't seem like a good fit for you, Mary is doing a great hike on Sunday that I think you might enjoy."
- "I know that this weight in your pack is okay right now, but think how this will feel 10 miles in and 1500 feet higher. Is there anything you would rather leave in your car to lower your pack weight?"

To learn about participant screening and handling challenging participant situations, visit the [Participant Screening](#) page.

2. Lost participant:

If someone on an outing becomes lost, leaders should follow the Sierra Club protocol for finding lost participants - **a search for lost participants will not begin after dark unless there is good cause for alarm, and searching will not begin (or resume) until eight o'clock the next morning**. This protocol should always be mentioned in the trailhead talk.

The Club's years of outings experience have led to the conclusion that such occurrences are rare and do not justify the danger to other outings participants caused by undertaking night searches. In any event, the lost person should understand that there are usually several hours of daylight before 8:00 A.M. in which to attempt rejoining the group before a search begins.

With lost children, your emotions, as well as the emotions of parents and other outings participants, often force action. If conditions necessitate a night search, proceed methodically. A closely spaced line of searchers is best. Amateur rescuers, by covering tracks or frightening a lost child with loud yelling, can make it even more difficult for experts to locate that child the next day.

3. Problem behaviors on outings:

Problem Behaviors from Participants: The following guidelines will help you deal with participants whose behavior seriously disrupts the progress or safety of an outing.

During the outing

If all attempts to deal with a problem behavior fail, the leader has the authority to remove that participant from the outing. Leaders should do this only if they are truly disruptive to the progress or safety of the outing. Removing someone from an outing should be treated like any other evacuation, and they should be escorted back to the trailhead.

After the outing

Usually you can forget about the unfortunate situation once the outing ends. However, if you feel it is likely that the individual will want to participate on future outings, report the incident to your Outings Chair.

Problem Behaviors from Outings Leaders: In the event that there is a leader behavior problem on an outing, you should follow the problem behavior guidelines listed above **in addition to** notifying your Outings Chair. Problems with a leader come to the attention of the outings chair through a complaint from participants or other leaders, or from an incident report filed after an outing. Complaints sometimes arrive at Sierra Club headquarters and are then passed to the [Local Outings Support Committee](#), which supports the local entity with the process. Leader issues are generally handled by the outings chair and any relevant committee in the entity.

- If there is an indication of potential legal action, immediately contact the Director of Outdoor Activities for additional support and direction.
- Sexual harassment claims must be reported to the National Office via an Incident Report.

See the [Problem Behavior](#) page for more details on both of these guidelines.

4. Dealing with hostile non-participants:

Occasionally you may encounter people who become confrontational. Regardless of the cause of the hostility, the best course of action is to avoid any conflict and quickly distance your group from the hostile non-participants. If your group felt overly threatened during the confrontation, or any laws or land use regulations were violated, contact the proper authorities as soon as possible. If authorities are contacted, be sure to submit a completed Sierra Club [Incident form](#), and the national office will follow up with you to provide advice and assistance.

5. Leaving an outing early:

As a leader, it is your job to keep track of participants from the start of an

outing to the end. If a participant wishes to depart from the group before the end of an outing, you must make sure the participant is "signed out." If your outing is using the [Sign-In Sheet and Liability Waiver](#) (see [Forms](#)), then simply ask the participant to initial the "Early Sign-Out" column. If your outing does not use a sign-in sheet, ask your Outings Chair for the sign-out procedure for your program. Participants may not sign out and then sign back in later in the outing.

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G. Ending an Outing

Before everybody goes home, make sure to take care of these details:

- Double check the sign-in sheet or trip roster to ensure that all participants are accounted for.
- Distribute outing evaluations to all participants, if your entity uses them.
- Invite non-members to join the Sierra Club (have membership brochures available).
- Distribute any other Club materials you have, particularly ones related to your conservation message.
- Ask participants if it is okay for you and/or the Sierra Club to contact them in the future.
- Make sure everyone has a way home.
- Thank them for their participation, and invite them to join a Sierra Club outing again.

H. After an Outing

Each Sierra Club Outings program has slightly different procedures for post-outing reports. In every case, the following items must be reported:

1. Incident reports:

An [Incident report](#) needs to be filled out and filed with the Sierra Club Risk Management Department in the following situations:

- Any incident that requires search, rescue or evacuation.
- Any injury that requires major first aid.
- Any injury or illness that could have future complications. (i.e. animal bite, severe sprain, etc.)
- Any act of suspected sexual harassment or child abuse.
- Any act that violates the law.

See [Reporting an Incident](#) for details.

In the event of an incident, mail/fax your [Incident Report](#) form, the participant's liability waiver and all other documents relevant to the incident to the Sierra Club Outings office.

2. Liability waivers:

Give all signed liability waivers to your entity outings chair or designee. For National Outings and Local/ICO restricted outings, mail liability waivers to the Outings Department. For outings with an incident, send the participant's waiver with the incident report to the Risk Management office.

3. Additional ideas:

These additional items are not required, but they will improve your outings program and the Sierra Club as a whole.

- *Communicate with participants*- If you can, keep in touch with participants after the outing. Let them know about events related to the conservation issues you discussed, or notify them of future outings that you lead. Many outing participants become devoted

Sierra Club volunteers, activists, and leaders. Keeping in touch will help make that happen.

- *Prepare an outing write-up or slide show*-Write an article about the outing for your newsletter or website, or ask a participant to do so. Include photos if possible. These articles help spread the word about Sierra Club Outings and inform other leaders of potential spots to visit or avoid. Slide presentations are also a great way to let people know about natural places to explore, enjoy, and protect.

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V. Online Resources

- [Acronym List](#)
- [Charges for Outings Policy](#)
- [Certificates of Insurance Questions and Answers](#)
- [Common Pediatric Illnesses](#)
- [Definition of a Sierra Club Outing](#)
- [Emergency Response Card](#)
- [Emergency Response - Patient Report form](#)
- [Exchange of Conservation Information](#)
- [First Aid Policy](#)
- [FAQ Pages](#)
- [Forms Page](#)
- [Fundraising Outings Policy](#)
- [Local Outings forms page](#)
- [Insurance](#)
- [LEADERS](#)
- [Leader Standards Policy](#)
- [Liability Waivers](#)
 - Sign-In Sheet & Liability Wavier
 - Individual Liability Waiver
- [Liability Waiver FAQ](#)
- [Liability Waivers and Acknowledgement of Risk Descriptions](#)
- [Medical Form](#)
- [Medical Resources](#)
- [Medical Protocols](#)
- [Outdoor Outreach website](#)
- [Participant Screening](#)
- [Permit Information](#)
- [Problem Behavior](#)
- [Reporting an Incident](#)
- [Restricted Outings](#)
- [Safety Management/Emergency Response Plan](#)
- [Trailhead Talk Card](#)
- [Transportation](#)
- [Trip Planning and Design: The 10 Essentials](#)
- [Use of Third-Party Services](#)

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Last updated on 03/12/2008

Sierra Club Outing Department

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Outings Leader Training - Basic (OLT 101)

Self Assessment

This self assessment is designed to enhance the OLT 101 learning process and may be used in many different ways. For example, leaders can individually check their knowledge level, or outings and training chairs can use this with leaders to enhance an existing training event. To easily print a copy, you can use the "*Print this page*" function at the bottom of the left navigation bar.

The answers to most of these questions can be found in the text of OLT 101. There are a few questions at the end (22-25) that require resources other than OLT 101. If you need assistance with these questions, see the following sources:

- <http://clubhouse.sierraclub.org/outings/Insurance/overview.asp>
- <http://clubhouse.sierraclub.org/outings/policy/FirstAid/index.asp>
- <http://clubhouse.sierraclub.org/outings/forms> for the **Trailhead Talk** laminated card
- <http://clubhouse.sierraclub.org/outings/Common/Resources/LNT.asp> or the **Leave No Trace** laminated card

1. Which of the following is a primary goal of Sierra Club Outings?

- Take as many people as possible on hikes.
- Support the Sierra Club mission by connecting people with the natural world.
- Restrict outings to members only.
- Make money from outings participants.

2. There are several national volunteer committees that support local leaders and outings chairs. These include the Outdoor Activities Governance Committee (OAGC), the Outdoor Activities Training Committee (OATC), the Outdoor Activities Medical Advisory Committee (OAMAC) and the Mountaineering Oversight Committee (MOC). Which of the following Outdoor Activities programs receive support by the aforementioned committees

- National Outings Programs
- Group and Chapter Outings Programs
- Inner City Outings Programs
- All of the Above

3. A "restricted" outing requires following specific rules when planning and conducting them. Which of the following are "restricted" outings?

- Mountaineering and rock climbing
- Simple backpack trips
- Challenge courses (i.e. High and low ropes courses)
- International outings
- a, c, d

4. What resources are available to help trip leaders incorporate conservation into their outings program?

- Outdoor Outreach Guide for Outings leaders
- Invitation to Advocacy brochure
- [Outdoor Outreach website](#)
- All of the above

5. Which of the following should be included in trip planning?

Training Home

- Ask Us
- About Us
- Basic Trainings
 - ICO OLT 101
 - OLT 101
 - Child Abuse Recognition and Prevention
- Advanced Trainings
 - OLT 201
- FAQs
- First Aid Providers
- Outings History
- Outings Chair Training
- Policies & Procedures
- **Updated!** Teaching Material
- Training Events
- **NEW!** WFA Applications
- Leading In Other Programs

Outings-Wide Resources

- Emergency Information
- First Time Visitor? Lost?
- Insurance Information
- Permits
- Materials Order Form
- Medical Resources
- Training
- Outings History
- Outdoor Outreach
- Committees
- Clubhouse
- WILD
- Terms & Conditions

Print View

SEARCH

- a. Trip location, route, and required gear
 - b. Participant profile (e.g., skills and gear required)
 - c. Safety management planning
 - d. Entity approval and publicity
 - e. All of the above
6. When preparing a safety management plan before a trip, a leaders should:
- a. Write down the location of the nearest hospital.
 - b. Note the locations of ranger stations.
 - c. Find out what agency is responsible for search and rescue.
 - d. All of the above.
7. Under the Americans with Disabilities Act (ADA) leaders must consider all of the following criteria when screening a participant, except:
- a. Can the person take part on the outing without the Club incurring excessive cost or effort to allow participation?
 - b. Will other participants feel uncomfortable?
 - c. Can the person take part on the outing without endangering their own safety or the safety of others?
 - d. Can the person take part on the outing without fundamentally changing the nature of the activity?
8. What criteria might a leader use to screen participants?
- a. Fitness - this includes conditioning/stamina
 - b. Experience - technical expertise
 - c. Equipment - being able to obtain necessary equipment to participate in the outing safely
 - d. All of the above
9. If carpooling is to occur, what must the leader do:
- a. Make sure passengers are divided up equally between cars.
 - b. Ensure that drivers have proof of insurance.
 - c. Advise participants in advance that carpools are a private arrangement and that the Club will not assume responsibility for carpools.
 - d. Determine who should drive based on driving records.
 - e. a, b, d
10. All outings participants MUST sign a liability waiver except on outings on which waivers are prohibited by a government land agency regulation. In these cases,
- a. Participants don't have to sign anything; the government takes responsibility for them.
 - b. Leaders are not allowed to lead hikes in the area.
 - c. A government agent must lead the hike.
 - d. All outing members must sign an Acknowledgement of Risk Form in place of a Liability Waiver.
11. A Minor Release form is necessary for:
- a. All participants under the age of 21.
 - b. All minors (those under the age of 18) who travel without a parent or guardian.
 - c. Only for Inner City Outings.
 - d. Only for National Outings.
12. On the trail, which of the following is appropriate trail protocol?
- a. The sweep keeps track of the route and sets an appropriate pace.
 - b. Cut between switchbacks if you see your participants are getting tired.
 - c. Leaders should always stop at trail junctions and ensure the group members behind you know which way to go.

- d. The point brings up the rear and ensures that no participant is left behind.
13. What is the first thing to do in an emergency situation?
- Call 911.
 - Move the injured out of harm's way.
 - Survey the scene to determine what happened, scene safety and number of patients.
 - Perform triage.
14. In an emergency situation, the role of the "primary" leader is:
- Administer first aid.
 - Supervise first aid.
 - Address the needs and safety of the entire group, manage resources, and coordinate evacuation plans.
 - Go for help.
15. Sierra Club protocol concerning lost participants states:
- If it is dark, the leader will search for the participant; the assistant leader will stay with the group.
 - A search for lost participants will not begin after dark unless there is good cause for alarm, and searching will not begin (or resume) until 8 am the next morning.
 - Other participants are NOT allowed to search for those who are lost.
 - Only one participant may be sent out to search for the lost participant.
16. If a participant is truly disruptive to the progress or safety of an outing,
- The participant may be sent back alone to the trailhead.
 - The leader must continue with the outing but segregate the disruptive person.
 - The leader may remove the participant from the outing and should have someone escort him/her back to the trailhead.
 - The participant may be left at the next trail crossing.
17. When a participant leaves an outing early, he/she should:
- Initial the "Early Sign-Out" column of the sign-in sheet.
 - Not be allowed to join future outings, because he/she can't seem to finish.
 - Leave quietly so other participants don't see them.
 - Be given a map and a compass so they can return to the trailhead.
18. An incident report must be filed for:
- All injuries, even minor scratches and blisters.
 - Lost participants
 - Disruptive participants
 - Any illness or injury that could have future complications or require medical attention after the outing.
 - b and d
19. At the conclusion of the outing, the leader should *primarily* :
- Collect donations for the Sierra Club.
 - Assure all participants are accounted for, offer advocacy or Sierra Club brochures, and thank them for their participation.
 - Get phone numbers of any dating prospects.
 - Lecture participants on the importance of becoming advocates.
20. At the end of the trip, liability waivers:
- Must be kept by the leader for 3 years.
 - Must be sent to the National Outings Office.
 - Must be sent to the entity chair.

- d. Can be disposed of 24 hours after the event.
21. Additional information can be found :
- a. In the Sierra Club Outings Leader Handbook
(<http://clubhouse.sierraclub.org/outings/Handbook/index.asp>)
 - b. In the Training Extranet
(<http://clubhouse.sierraclub.org/outings/training/>)
 - c. From your Outings Chair
 - d. All of the above
22. For the Club's insurance policy to cover an outing, which of the following criteria MUST be met?
- a. The person must be a paid employee of the Sierra Club.
 - b. The outings must have been officially authorized or sponsored by the Club or one of its entities.
 - c. The leader must have WFA (wilderness first aid) training.
 - d. The trip participants may not leave the continental US.
23. According to the Outings Leader Handbook, a leader must carry a first aid kit:
- a. Appropriate for the activity.
 - b. Large enough to serve all participants on the trip.
 - c. Only if no one else carries one.
 - d. Only on wilderness trips.
24. During the "trailhead talk", leaders should :
- a. Ensure all participants have proper gear, food, and clothing.
 - b. Inform participants which leader is in charge of first aid.
 - c. Describe the route plan and trail conduct.
 - d. All of the above.
25. According to "Leave No Trace" principles:
- a. Participants should bury all trash near their campsites so it can't be seen.
 - b. Cooking utensils should be cleaned on the edge of the water up river from swimming areas.
 - c. All trash, leftover food, and litter should be packed out.
 - d. Leftover food should be fed to area wildlife.

[Self Assessment Answer Key](#)

Last updated on 03/15/2007

Sierra Club Outing Department

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