



**PART ONE  
OF TWO**

**Chapters  
1-5**

# **LEADER'S REFERENCE BOOK**

Leadership Training Program



**March 2019 Edition**  
Leadership Training Committee  
Angeles Chapter, Sierra Club

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*“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.”*  
John Muir

Welcome to the Leadership Training Program (LTP) for the Angeles Chapter of the Sierra Club! Becoming an outings leader with the Angeles Chapter means that you are part of a long history of successful outings leadership. The **Leadership Training Committee (LTC)** first published the **Leader’s Reference Book (the LRB)** in 1973, and ever since then, LTC has trained, and the Safety Committee has certified, hundreds of leaders a year. Today, the Angeles Chapter has the largest outings program of any Sierra Club Chapter, with well over 2,000 trips a year. We are glad to have you join us!

The pages that follow describe the steps to becoming a new outings leader for the Angeles Chapter. At the same time, these pages and chapters together serve as a valuable resource for our established leaders and outings chairs. You will find essential information about how we conduct “outings” - trips, hikes, walks, backpacks and other outdoor activities - that conform to Sierra Club policies and procedures. You will learn how to organize and manage these outings along with ways to acquire more basic and technical skills and how to apply these skills to Sierra Club activities. Our goal is to help leaders conduct safe, enjoyable, and environmentally inspired outings—the foundation goals of Angeles Chapter outings. As ambassadors for the Sierra Club, leaders can enhance participants’ enjoyment and appreciation of the outdoors.

Chapter 1 describes the nuts-and-bolts of the ratings and how to get there; Chapter 2 outlines the Sierra Club’s mission and priorities and how outings supports the mission; Chapter 3 covers a top priority - Safety. Chapter 4 will show you best practices in leadership and how to conduct successful outings; Chapter 5 is about first aid; Chapter 6 is devoted to navigation and 7 and 8 cover rock and snow skills.

Your personal growth as a leader will go beyond what these pages offer. Expand your knowledge of the natural environment we all share; hone your leadership skills as you develop your style, and seek more knowledge from various books and other sources, as well as from experienced leaders and diverse participants eager to go with you on adventures outdoors.



*The Leadership Training Committee’s website is your resource for more information as well as access to needed Forms, updated policies and outings news. This is the place where you can access this book and its chapters.*

[sierraclub.org/angeles/leadership-outings](https://www.sierraclub.org/angeles/leadership-outings). See “How to Use the LTC Website” later in this chapter.

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# Leadership Training Program

The Leadership Training Program is sponsored by the Angeles Chapter Leadership Training Committee. The program starts with an introductory one-day seminar that covers all the basics from safety, first aid, and conservation leadership best practices and scenarios.

### ABBREVIATIONS

Abbreviations and acronyms are used in the Leader’s Reference Book and Sierra Club publications as well as on the trail or in meetings. Many of these may be familiar and some probably not so familiar to prospective leaders.

ExCom	Executive Committee of the Angeles Chapter
GPS	Global Positioning System
GSC	Group, Section, or Committee of the Angeles Chapter
DPS	Desert Peaks Section
HPS	Hundred Peaks Section
SPS	Sierra Peaks Section
ICO	Inspiring Connections Outdoors
LRB	Leader’s Reference Book
LTC	Leadership Training Committee
LTP	Leadership Training Program
MOC	Mountaineering Oversight Committee (National Sierra Club)
NLS	National Leader Standards
OC	Outings Chair (of a GSC)
OLH	Outings Leader Handbook (National)
OLT 101	Outings Leader Training 101: on trail, basic
OLT 201	Outings Leader Training 201: overnight, farther away
OMC	Outings Management Committee
USGS	United States Geological Survey
UTM	Universal Transverse Mercator (mapping coordinate system)
AMP	Advanced Mountaineering Program
WTC	Wilderness Travel Course or Wilderness Training Committee

### GLOSSARY

CHAPTER	The Sierra Club’s local representation, e.g. The Angeles Chapter
GROUPS	Regional groups, in a chapter, e.g. West LA, Orange, Long Beach, etc.
SECTIONS	Recreational activity sections of a chapter, e.g. SPS, HPS, SPS
COMMITTEES	Local GSC that may sponsor outings or focus on conservation or political action or other chapter or group need
TASK FORCE	Focus on an immediate issue, or an ongoing environmental one; may sponsor outings
CAMPFIRE	<u>Campfire Events</u> is the online portal for leaders to enter their events; <u>Campfire Community</u> is a National Sierra Club resource for leaders, replacing “Clubhouse.”

LTC also sponsors a series of training courses and field exercises designed to prepare you for leadership at one of the nine leadership rating levels that correspond to the technical skill levels required to lead them. LTC tracks your progress and when you have completed all requirements, sends your file to the Safety Committee to certify your rating. **This is the Chapter’s unique ratings system: O-1, O-2, I, M-rock, M-snow, M, E-rock, E-snow, and E.**

LTC events can be viewed on the website’s Home page as well as on the Chapter’s Schedule of Activities.

*These abbreviations and glossary will be useful when you read these chapters and beyond.*

## Leadership Ratings Overview

**O-level outings** are limited to Class 1 terrain (walking/hiking) and include nature walks, conditioning hikes, day hikes, and overnight backpacks on trails that require only minimal navigation skills. Leaders rated at the **O-1** level may lead day hikes and car camps. **O-2** level leaders may also lead backpacks. Most Angeles Chapter activities are at the “O” level.

**I-level outings** require navigation skills for significant off-trail travel, which may include Class 2 terrain (occasional use of the hands for balance).

**M-level outings** (M-Rock, M-Snow, M) include skills for leading Class 3 rock climbs (frequent use of hands for upward progress) and moderate snow climbs, which may require the use of an ice axe, as well as navigation skills. M-rock leaders may not lead moderate snow climbs; M-snow leaders may not lead class 3 rock climbs.

**E-level outings** (E-Rock, E-Snow, E) add skills for leading Class 4 rock (consistent use of the hands for upward progress and more exposure to falling) with a rope, anchors, protection, and belays; steep snow climbs that require the use of ice axe and crampons and may require roped travel and belays; and advanced navigation, which may require the use of an altimeter.

A few Angeles Chapter entities offer outings rated **T** for **Technical**. These require specialized skills, and leaders of these trips are approved by the entity to lead the technical aspect of the outing in addition to having an appropriate leader rating granted by the chapter. Examples include sailing and ski mountaineering.

### WHAT IS DISTINCTIVE ABOUT ANGELES CHAPTER OUTINGS?



*We generally require two rated leaders - at or above the rating of the trip - for each outing. Years of outdoors experience has taught us that this requirement enhances the safety of all participants on our outings.*

### Completion Requirements For All Ratings

A summary of the requirements is outlined in the chart below. Each of these requirements is explored in more detail throughout this chapter and other chapters in the LRB.

LTC may change these completion requirements, (including the specifics of the technical checkoffs), at any time and may require you to comply with the new changes.

## SUMMARY OF LTP COMPLETION REQUIREMENTS FOR NEW LEADERS

Requirements	0-1 & 0-2	I	M-rock	M-snow	M	E-rock	E-snow	E
<b>LTP Seminar &amp; pre-exam</b>	1 day	1 day	1 day	1 day	1 day	1 day	1 day	1 day
<b>Standard First Aid</b>	Yes							
<b>CPR</b>	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Wilderness First Aid 24+ hours</b>		Yes	Yes	Yes	Yes	Yes	Yes	Yes
<b>Environmental Awareness</b>		14 hours	14 hours	14 hours	14 hours	14 hours	14 hours	14 hours
<b>EXAMS (M &amp; E)</b>			M yes	yes	yes	E yes	yes	yes
<b>Technical Checkoffs (Checkouts)</b>								
<b>Navigation</b>		I/M Nav.	I/M Nav.	I/M Nav.	I/M Nav.	E Nav.	E Nav.	E Nav.
<b>Rock</b>			M-rock		M-rock	E-rock		E-rock
<b>Snow</b>				M-snow	M-snow		E-snow	E-snow
<b>Provisional Leads</b>								
<b>Provisionals (number)</b>	1 each	2 <sup>2</sup>	1-2 <sup>3</sup>	1-2 <sup>3</sup>	2-3 <sup>3</sup>	2 <sup>4</sup>	2 <sup>4</sup>	3 <sup>4</sup>

<sup>1</sup> For the O-1 level, the provisional outing is a day hike or car camp. For the O-2, an overnight backpack.

<sup>2</sup> For an I, one trip must be a backpack with significant cross-country wilderness travel, and the other may be a day hike, with same.

<sup>3</sup> For M Rock and M Snow, one outing if you are already an "I" rated leader and one each for a "full" M rating. An additional outing is required if you are not an "I" rated leader. See M/E ratings for additional information.

<sup>4</sup> For E Rock and E Snow, 2 outings if you are already a rated I or M leader. For "full" E, one additional outing.

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## The Basics for Becoming an Outings Leader

- **Age.** Be at least 18 years old.
- **Club Membership.** Be a current Sierra Club member. Only members can lead outings for the Club.
- **Experience.** Have participated in five qualifying Sierra Club trips during the past 10 years.

- **The Seminar.** Attend the Leadership Training Seminar, and pass the exam.
- **\*First Aid.** Have the required First Aid / CPR training (I, M and E require Wilderness First Aid - WFA - or above.)
- **Other Training or Requirements.** Have the applicable technical training and experience for the I, M, and E ratings. Some entities (like Inspiring Connections Outdoors) have additional requirements.
- **Progress.** Keep the Leadership Training Committee Administrative team informed as you make progress on these requirements ( LTCAngelesChapter@gmail.com).
- **Provisional Status.** Be okayed by the LTC as a “provisional leader” - which means you are ready to lead your first outing under the supervision of an experienced leader.
- **Plan, publish, and lead** your provisional outing(s) with an experienced leader serving as an assistant leader and “evaluator”.
- **After your provisional outing:** Send your self-evaluation and the assistant leader’s evaluation to the LTC Administrative team.
- **Certification.** The Safety Committee reviews the evaluations and certifies you to lead for theChapter!

**\*First Aid Expiration and currency:** CPR, First Aid /Wilderness First Aid and above will be considered “current” through the expiration date shown on the card issued by the certifying organization, usually one to two years for standard first aid and CPR courses, and usually 2-3 years for Wilderness First Aid.

**You will need to be current in both CPR and First Aid/ WFA to lead your provisional outing(s) and at the time your rating is granted.**



*See “Maintaining Your Rating” for requirements once you have your leadership rating.*

### **Sierra Club Membership**

Leaders must maintain their Sierra Club membership. Although most of the Angeles Chapter’s outings are open to all qualified participants from the public, only Club members may lead outings.

**Information on Sierra Club membership – [Join here!](#)**

### **National Leader Standards**

*The Sierra Club’s National Leader Standards (NLS) became effective January 1, 2006, for the Angeles Chapter. The NLS divide outings into two basic types: Level 1 outings, such as day hikes and car camps, and Level 2 outings, such as backpacks or other trips with an overnight stay away from cars. The Angeles Chapter continues to use its O, I, M, E, and T leader ratings without conflict with the NLS. **Leaders trained under the Angeles Chapter’s Leadership Training Program meet all these standards.***

### **Sierra Club Qualifying Experience Trips**

Prior to leading provisional outings, you must have participated on five Angeles Chapter Sierra Club outings at the O level or higher within the past ten years. This gives you the opportunity to become familiar with Chapter outings and procedures, meet other hikers and gain a familiarity with what our outings programs have to offer. Participation on trips with various leaders can help you develop a sense of your own leadership skills and style, possibly connect you with a leader mentor, and provide introductions to those who may serve as assistant leaders and evaluators for your outing(s).



**Exceptions?**

- A maximum of two regularly occurring conditioning hikes or the like may be counted toward the experience trip requirement.
- Activities such as lectures, picnics, or workshops do not qualify, nor do LTC checkoffs, practices and similar training outings.
- WTC: either the Wilderness Travel Course (WTC) snow camp or Joshua Tree weekend qualifies (but not both) - and neither the all-day or full-day hike nor the snow travel day count. Post-course WTC "Experience Trips" do count. One trip credit can also be given after you have been on WTC Staff for a year or more. Ask us or the WTC Outings Chair for more information.

- ✂ **O2 level candidates** should have at least one Sierra Club overnight backpack experience trip on their resume. This may be either at the O-2 level (on trail) or at the I-level or above.
- ✂ **ICO (Inspiring Connections Outdoors)** has additional requirements.
- ✂ **I, M and E candidates** have additional requirements and experience needed to lead at these levels. See sections on I and M & E later in this chapter.
- ✂ **Equivalent Credit** may on occasion be granted for other trips. The LTC Chair and/or LTC Administrative Chair may grant credit for trips other than scheduled Angeles Chapter Sierra Club trips. If you'd like that credit, send the information along with your application.



## The Leadership Training Program Seminar

The first step in the Leadership Training Program is to attend the one-day Leadership Training Seminar. It is held twice a year (once in the Spring and once in the Fall). Apply two weeks ahead to guarantee a spot and learn all about the best leadership practices of our Outings program. The all-day event covers group management, rules of conduct, safety and much more through a series of presentations, breakout groups and scenarios.

The pre-seminar exam is designed to assure LTC that you have a minimum level of familiarity with the information covered in these pages. After receiving your application and registration fee, the LTP Registrar will send you the exam. Turn in your completed exam as instructed by the registrar.

Email [LTPSeminarRegistrar@gmail.com](mailto:LTPSeminarRegistrar@gmail.com) for information.  
Sign up for the Seminar with the [LTP Application](#).

### Leadership Progression

When you register for the seminar, you may identify the leadership level that you are seeking: O-1, O-2, I, M-rock, M-snow, M, E-rock, E-snow, or E. If you are not sure, that's no problem, you can let us know after the seminar. The choice will depend on the level of outings you intend to lead. We recommend that you start at the "O" level in order to get experience managing groups of participants before attempting a more technical rating. However, that is not a requirement - if qualified, you can begin the Leadership Training Program as an E-level candidate. There is no requirement to obtain certification in succession. You will begin your journey as a "Leader Trainee"; when you have satisfied the prerequisites you will become a "Provisional" Leader.

You may obtain progressive leadership certifications without having to repeat similar requirements and without additional fees; you simply complete those unique requirements of the next level. Once certified at a specific level, leaders may conduct outings at or below that level for a sponsoring group, section, or committee.

### Provisional Status

Once you have satisfied the prerequisites (membership, seminar, qualifying experience trips, First Aid/CPR and specific ratings requirements), LTC Admin Chair will designate you as a provisional leader.

All Angeles Chapter outings are sponsored by specific Groups, Sections, and Committees (GSC), and conducted in accordance with the Chapter's Rules of Conduct and Safety Policy. We always like to advise candidates to explore what the various Angeles Chapter entities do so that you can widen your audience. Look at the various GSC websites, go on a few hikes offered by an entity you have not hiked with and go on more trips with the ones you already know.

Before you go and do that provisional outing, review Chapters 2, 3 and 4 and more to remind yourself of Club policies, safety, best practices and how to conduct your outing..

**Get to know your outings chair!** Don't know what that is? Every entity has someone who coordinates their outings. They can help point you to places to go, people to learn from, a mentor to consult as well as an evaluator to assist on your provisional. Outings chairs are your advocates. Work with your outings chair to get your trip scheduled and published.



*Tip: learn about Sierra Club structure and see org chart in Chapter 2.*

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## Now That You Are a Provisional Leader

### *Provisional Outings*

There are different requirements for O, I, M and E provisional outing(s). Here are some basics, starting with the O level (example below).

#### *Here are the steps towards leading your provisional outing*

- Be designated as a “provisional leader” by LTC Admin.
- Affiliate with a GSC who will sponsor your outing
- Plan your provisional outing. For an O-1 rating, it can be an on-trail day hike or an overnight car camp. For an O-2 rating, your provisional will be an on-trail overnight backpacking trip. See later for more on I, M and E.
- Find an assistant leader who will evaluate you.
- Submit your proposed outing to the outings chair of the sponsoring GSC.
- The outings chair will review your proposed trip, make sure your certifications and those of your assistant leader will be current at the time the trip is led, and then publish it.
- All trips must be published to be “official” Sierra Club outings. Trips may be published online (Schedule of Activities, GSC websites, newsletters) or in “print” GSC newsletters or Club publications (or both). See more about Trips and Writeups later in this chapter.
- Once your outing has been published, you may also list it on social media sites / Meet-ups. The listing needs to match the Sierra Club publication, disclose that it is a Sierra Club trip, and that a Sign-In Sheet and Liability Waiver will need to be signed.



*Tip: see Chapter 4 for planning and conducting your outing.*

### **Assistant Leaders on Provisional Outings**

All Angeles Chapter trips must have two leaders. For your provisional outing, you will be the primary leader responsible for conducting the outing. The other leader will be your assistant, and will also be evaluating you. The assistant/evaluator must be an active chapter leader who has been certified at or above the level of the outing for a minimum of two years, or has a commensurate level of experience and has been approved by the LTC Chair. The assistant leader must have current certifications. For advanced ratings, the Provisional Lead Committee approves your evaluator.

Your assistant leader should not be so familiar with you that an impartial evaluation might be compromised. In addition, the evaluating leader must be fully capable of conducting the outing and has the authority and responsibility to assume leadership of the outing at any time if the evaluating leader believes that the safety or well-being of the group is being jeopardized by your actions.

- The evaluating assistant leader can't be someone with a close relationship with you, i. e., a spouse, partner, or close relative.
- The evaluating assistant leader needs to have been a leader at the level of the outing for two or more years or have significant experience leading at that level and have been granted a waiver by the LTC Chair.

### **Tips for choosing an assistant / evaluating leader**

- Have you hiked with your evaluator before?
- Does your evaluator share your pace and your leadership style? (see Chapter 4).
- Has your evaluator been to the area where you want to go?
- Share your ideas about plans, pace and route ahead of the trip, if possible, and consider any advice the evaluator may give. Your outings chair may help.

Your assistant leader will observe and evaluate you and provide you with a written performance assessment. As a provisional leader, you are not expected to exhibit the same level of leadership maturity, poise, and group management skills as that of a seasoned leader. The comments offered by the evaluating leader are an important part of the provisional trip experience. Evaluators look for judgment, breadth and depth of knowledge, interpersonal skills, and practical expertise.

### **Planning and Leading your Provisional Outing**

**The O-level requirement** is to lead one outing that is rated O, either a day hike or car camp outing for the O-1 level or overnight backpack for the O-2.

The trip must be a unique trip that you plan and conduct, not a regularly occurring event such as a conditioning hike to a usual destination. You must select, plan and lead your provisional outing (you can't take over someone else's already-planned outing, and you shouldn't copy standard trips to overused places). You also need to prepare a write up for publication; see later in this chapter for how to do this.

Publication is required for all outings, provisional or not. All outings must be listed in an official Angeles Chapter publication, whether in print or online, such as a periodic newsletter of a GSC, or on a GSC web site or list server or the online Angeles Chapter "Schedule of Activities".

The outing write-up must include the name of the provisional leader and the assistant / evaluator and describe pertinent information about the outing (see examples under **Writing Up and Publishing Your Provisional** below).



*Skills for planning and leading your outing are covered in subsequent sections in this chapter and in Chapter 4.*

### ***Participants***

Your outing needs to have participants to count as a trip: you, a close friend, and the assistant leader do not make an acceptable provisional trip. An outing with leaders, but no participants, is not considered a Sierra Club outing. Provisional outings at the O-1 and O-2 levels should have at least six participants, not counting the two leaders, to demonstrate group management skills adequately.

Provisional leaders may be asked to lead another provisional if the LTC and/or Safety Committee considers the number of participants on a provisional outing to be too low for the demonstration of group management skills. In some circumstances LTC and the Safety Committee may jointly waive this requirement of a minimum number of participants. See Chapter 4 about screening participants.

### ***Scheduling Provisional Leads***

With the approval of the sponsoring GSC Outings Chair, you may schedule and publish your provisional outing before you've completed all the requirements to become a provisional leader. However, this requires that you have a reasonable plan to complete the prerequisites before the trip date, and the outings chair needs to notify the Safety Committee as well as actively monitor your progress.

With the ability to publish trips immediately to the online Schedule of Activities, the need for this should be limited. Exceptions would be reasonable when needed to meet the publication deadlines for printed or online newsletters.

If you have not been able to meet all the requirements by the date of the provisional outing, you will have a few options to consider:

1. The outing may be postponed until after the requirements are met. You should have a firm date in mind to communicate to would-be participants of the originally scheduled outing;
2. Another appropriately-rated leader may take over the trip for you, and you may schedule another outing for a later date; you may not participate in any leadership capacity on the original outing if you choose to join as a participant.
3. The outing may be canceled.

### ***Scouting Your Provisional***

You are encouraged to "scout" an outing in advance of leading it, especially if you have not been there recently. Scouting will allow you to confirm current trail conditions, identify good spots for breaks / lunch, and identify any hazards to warn participants about (e.g. poison oak, stream crossings). For I-rated and above outings, scouting may reveal alternative / escape routes, or other conditions that relate to cross-country travel.

## Writing Up Your Trip

When you look at a Chapter or GSC website, you will most likely see a “feed” from the online publishing tool, Campfire Events. The outing activities displayed are input by your outings chair, or even by leaders – and eventually by YOU.

### *The Basics*

But first, to create an effective write-up, you’ll need to have several details ready to go, whether you enter the event yourself or someone else does it.

### *Key facts to have handy*

Rating: 0-1 or 1, I, etc.	Trip Title	Date(s) & Time	Level (difficulty)	Short Description	Meeting Place	Leaders: names, and contacts, SC member #
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**Description:** include these details

- Difficulty: Terrain, steepness, pace, etc. Note unusual situations. Cross-country (XC) should be noted.
- Miles: Usually roundtrip (12 mi rt).
- Gain: (3000’ gain) Do not give loss unless different than gain. Give gain on return if significant.
- Any other information important to describe the event. Include any unusual conditions. Be brief, but give enough information so that prospective participants can determine if the event will suit their plans and abilities. Include all necessary information, restrictions, and requirements (not for beginners, Sierra Club members only [for restricted trips]).

**Meeting place and time or contact info:** in the description itself or other fields (see Campfire)

- Rideshare or meeting point: If participants are to meet at a carpool point or trailhead for trips not requiring prior sign-up, give meeting time and detailed location and directions if not a standard meeting point. Campfire does have a map feature that can pinpoint a location.
- Remember that leaders never arrange carpools, just provide contact information and meeting point.

**Other information:**

- Restrictions and caveats: activities requiring reservations should include any space limitations, deadlines, requirements for experience, contact info, fees, or other requirements.
- Contacting you: advise participants to be clear in the subject line of their email, i.e. “About Your Trip” is not clear. Name that trip! Feel free to remind them that you may have a wait list.
- Whether rain cancels or postpones: include your notice in the description. In Campfire, there is a dropdown menu.
- Make participants aware that this is a Sierra Club outing and that signing the waiver is mandatory. (You can point them to an example on the Chapter site.)
- Educational or Conservation component? Note that in the write-up!

## Campfire Events

Your ability to access and enter an outing into Campfire depends on your outings chair giving you “permission” to do so by adding you as a provisional (or certified) leader for their entity. Read the training material! Some outings chairs will prefer to enter your event themselves, and some will want your write-up and all the details ahead to pre-approve, or to send in to print or for an e-blast newsletter.



***Training and access to Campfire Events is available here:***  
[sierraclub.org/angeles/leadership-outings/campfire-events-training](https://sierraclub.org/angeles/leadership-outings/campfire-events-training)

### ***A few key points:***

- Unfamiliar with databases? Read the training materials first. Entering an event is not complicated!, but ask your outings chair before you do so that they can help you – and can ensure that you actually have access and that your event can be scheduled (doesn’t conflict with other trips).
- Log in: your email is important: it must match your membership. If not, we will have to help you sort this out. Membership services can also handle the task of finding you.
- Once you are in, you may see more than your entity listed in the dropdown sponsor menu. This is an occasional error. Let us know. Do select yours, however, not just the Chapter.
- Select “In Development” while you are working on gathering and entering your details.
- Leader names: the “Find Existing Leader” function works by narrowing the state and city for the person you are looking for. “Joe Leader, California” or “Joe Leader, Burbank” helps the search.
- We do recommend adding at least one leader name and contact within the short description. This way, your name is more likely to appear in a print version (if your entity does that).
- Select “Pending Approval” when you are ready for the outings chair to approve and make the trip Active in Campfire. When they do, an automatic email is sent to the Safety Committee for a review. If Safety catches something, you will hear about it.
- Remember that all outings must first appear in a Chapter GSC publication (the Schedule of Activities or GSC newsletter) before you can promote via social media or Meetup.

### ***Write-up etiquette***

Some trip details are standard such as peak elevation and mileage, but many leaders choose to enhance their write-up with fine prose. **Do NOT just copy someone else’s writeup!** Not only should you make the trip yours, you should display your own writing skills here and make sure that details are correct.

⇒ If you do borrow someone’s well-written description or catchy phrases, consider asking the writer first and maybe giving credit.

- Contact LTC webmaster, OMC Chair or LTC Admin with issues that your outings chair can’t answer.
- [LTC webmaster ltcwebmaster@angeles.sierraclub.org](mailto:ltcwebmaster@angeles.sierraclub.org)
- [OMC@angeles.sierraclub.org](mailto:OMC@angeles.sierraclub.org)
- There is also a support for campfire events at [campfire.events@sierraclub.org](mailto:campfire.events@sierraclub.org)

## ATTRACTING PARTICIPANTS TO YOUR TRIP

Sometimes the basics are just not enough. A potential participant may ask “ Why should I go on your outing?” Part of your preparation as a leader is to ensure that you have people on your trip. That means writing up the trip in a way that attracts eyeballs. Look at what your GSC offers and what is on the Chapter’s Schedule of Activities web page. Consider co-sponsoring to attract a wider audience; use social media with a link to the online Sierra Club link, but only after your outings chair has approved and made the trip Active in Campfire.

**v. 1: has the information but is it enticing enough?**

### I: Goat Mountain (12,212)

Date: August 5-6, 2016

Level: Strenuous

Saturday backpack 6.3 mi, 5200’ gain to camp at Grouse Lake. Sunday class 2 XC climb of Goat, 4.5 mi rt, 1800’ gain then pack out. Contact leaders with experience and conditioning.

**v.2 maybe better**

Backpack in Kings Canyon suitable for strong hikers. Saturday backpack 6.3 mi, 5200’ gain to camp at Grouse Lake. Lakeside camping and Saturday night Happy Hour. Sunday class 2 XC climb of Goat via NE ridge, 4.5 mi rt, 1800’ gain. On the summit we will enjoy vistas of the Palisades, Mt. Whitney, and the Kaweahs. Return to camp, and pack out the same day, tired but satisfied. Contact leaders with experience and conditioning.

**V3 with Campfire, you can add a picture and embellish your write-up with YOUR personality.**

Kings Canyon? YES! Climb a peak with great views? YES! Then come with us! Saturday backpack 6.3 mi, 5200’ gain to camp at Grouse Lake. All on-trail, and as we know trail miles are “free” miles! (ish). Lakeside camping and Saturday night Happy Hour. Sunday class 2 XC climb of Goat via NE ridge, 4.5 mi rt, 1800’ gain. On the summit enjoy vistas of the Palisades, Mt. Whitney, and the Kaweahs. Return to camp & pack out same day, tired but satisfied. Contact leaders...



**Campfire Preview example:**

### Leadership Training LTP Seminar

**Date and Time:**  
Sat, Apr 13, 2019 8:00 AM - 4:30 PM (Local Time)

[Add to Calendar](#)

**Organized By:** Angeles Ch Leadership Training

**Location:** 5950 Stoneview Dr, Culver City, CA 90232, USA  
[Map](#) | [Directions](#)

**Event Organizers:**  
Anne Marie Richardson  
amleadership@gmail.com  
(909) 621-2812

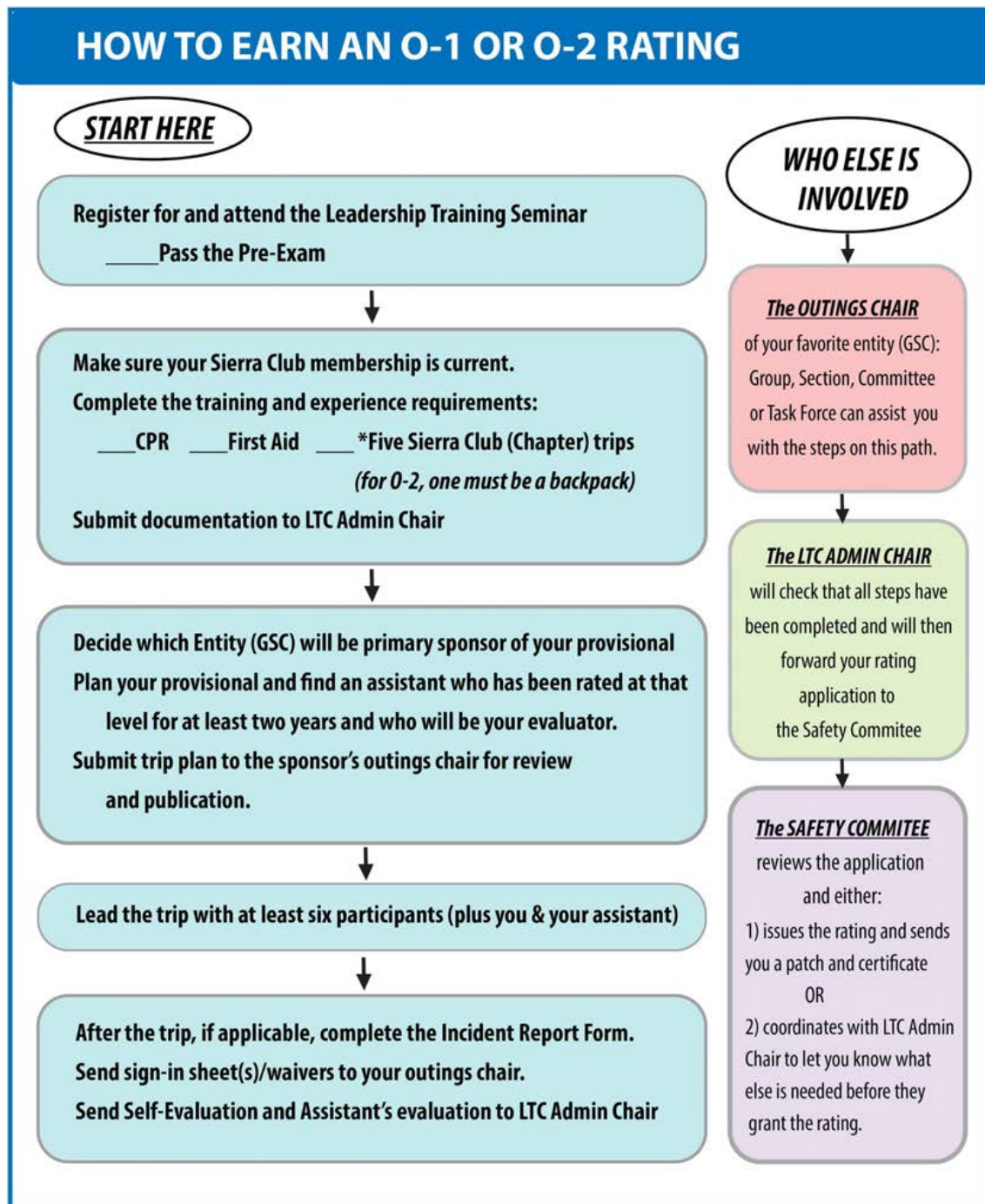


Offered just twice a year, the next Sierra Club Angeles Chapter’s Leadership Training Program (LTP) Seminar is scheduled for Saturday, APRIL 13, 2019. Apply at least two weeks in advance to guarantee your spot. Later applications accepted on a space-available basis but are not guaranteed, so register early. Come learn all about the best leadership practices of our outings program. This all-day event covers group management, our ratings system, rules of conduct, safety and much more, from presentations, breakout groups and scenarios.



## The “O” Leadership Rating

“O” rated leaders are the backbone of the Angeles Chapter Outings program. Most of our outings are led at this level - and they encompass a wide variety of activities. “O” level outings include conditioning hikes, short or long day-hikes to a peak, urban walks, camping trips and overnight backpacking trips.



## First Aid Requirements for the “O” Rating

**CPR:** All candidates must have a current certification for (at minimum) an American Heart Association, American Red Cross, or equivalent one-person adult (or higher) cardiopulmonary resuscitation (CPR) course.

**FIRST AID:** You will also need current certification from a four-hour minimum American Red Cross or equivalent standard first aid course. This needs to be an “in-person” course, or an online self-study course with an in-person skills demonstration.

An online-only course does not qualify for a provisional leader. Advanced First Aid courses, including Wilderness First Aid, are encouraged, but not generally required to lead at the “O” level. International outings may require a higher level of First Aid certification; check with the sponsoring Outings Chair.



### **ALREADY A LEADER?**

See **MAINTAINING YOUR RATING** at the end of this chapter for what you need to do to stay current, aka refreshing “OLT101” and First Aid.

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## The Provisional O Outing

- You will need at least 6 participants for the duration of your trip, in addition to your assistant and yourself.
- Your assistant leader will be evaluating how well you handle the mechanics of leading (sign-in sheets/waivers, pace and rest stops, taking the correct trail / not getting lost, keeping the group together), how you handle the interpersonal (confidence, creating a welcoming environment, sensitivity to how your participants are doing) and your judgment (how you handle any unexpected situations or any “problems” if they come up).
- Camp selection for an O-2 rating.
- As a new leader you’re not expected to exhibit the same level of expertise as a “seasoned” leader.
- There are things you can do before your trip to prepare and improve your performance:
  - scout your trip, think through how you would handle potential unexpected situations, attend a “basic” navigation clinic.
  - See Chapter 4 for more on leadership and leading trips.

**Note: for “I” and above, there are more technical requirements that will be evaluated on a provisional.**

✎ For the I, you must demonstrate understanding of navigation;

✎ for M & E you will be expected to demonstrate technical skills in rock and/or snow.

✎ See more about I, M and E later in this chapter and other chapters.

## About First Aid

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A Sierra Club leader needs to be prepared to handle illnesses and injuries that might happen outings. You will be responsible for caring for the patient until they can be taken to medical care.

➔ Your First Aid training should match:

- (1) the types of hazards you are likely to encounter, and
- (2) how long it will take to get an injured person to medical care.

- **ONE HOUR OR LESS AWAY FROM MEDICAL CARE:** Standard First Aid course
- **MORE THAN ONE HOUR AWAY / OVERNIGHT:** a longer first aid course such as Wilderness First Aid (WFA) is encouraged for “O” rated leaders and required for “I”, “M”, and “E” leaders.



**Chapter 5 explores First Aid more thoroughly, including how to choose a first aid course, a review of legal considerations and how to respond to wilderness accidents and illnesses.**

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## The “I” Leadership Rating

The “I” Rating allows you to leave the trail and lead cross-country trips. As a result, there are additional training and experience requirements for those who want to lead at that level.

The requirements are:

- ✎ Be a current Sierra Club member
- ✎ Attend the Leadership Training Seminar and pass the exam. (If you are already an “O” rated leader you do not have to attend the seminar again, unless you want to.)
- ✎ Have prior cross-country travel and backpacking experience within the last 10 years.
  - That’s at least five Angeles Chapter trips,
  - including three at the I-level - one of which must be a backpack.
- ✎ Be current in CPR as on the provider card.
- ✎ Have a current certificate from a 24+ hour Wilderness First Aid course or higher.
- ✎ Pass the I/M level navigation technical checkoff
- ✎ 14 hours of Environmental Awareness Training, to be accomplished prior to granting the rating.
  - There are many options for satisfying this requirement. See below.
- ✎ Lead two provisional cross-country outings.
  - One must be a backpack.

# HOW TO EARN AN I RATING

## START HERE

It's a good idea to get that 0 rating first (but it's not required).  
And/or attend the Leadership Training Seminar and pass the exam.

Make sure your Sierra Club membership is current.  
Complete the training and experience requirements:  
\_\_\_ CPR \_\_\_ 24 hr WFA \_\_\_ 14 hr Environmental Awareness  
\_\_\_ Navigation \_\_\_ \*Five Angeles Chapter trips (3 at the I-level)  
Submit documentation to LTC Admin Chair.

Decide which Entity (GSC) will be primary sponsor of your provisional.  
Plan your provisional and find an assistant who has been rated at that level for at least two years and who will be your evaluator.  
Submit your trip plan to LTC Admin to ensure it meets standards:  
- use the *Request for Review Form* found on LTC website or ask us.  
Submit approved plan to sponsor's outings chair for publication.

Lead two trips with at least six participants (plus you & your assistant)  
- *one trip must be a backpack; both with significant x-c travel.*

After the trip, if applicable, complete the Incident Report Form.  
Send sign-in sheet(s)/waivers to your outings chair.  
Send Self-Evaluation and Assistant's evaluation to LTC Admin Chair

## WHO ELSE IS INVOLVED

**The OUTINGS CHAIR**  
of your favorite entity (GSC):  
Group, Section, Committee  
or Task Force can assist you  
with the steps on this path.

**The LTC ADMIN CHAIR**  
will check that all steps have  
been completed;  
reviews trip plans  
and will then  
forward your rating  
application to  
the Safety Committee

**The SAFETY COMMITTEE**  
reviews the application  
and either:  
1) issues the rating and sends  
you a patch and certificate  
OR  
2) coordinates with LTC Admin  
Chair to let you know what  
else is needed before they  
grant the rating.

## I Experience Outings

As with the "O" rating, you will need to have completed five outings with the Angeles Chapter during the past ten years. However, for the "I" rating, three of the five outings should be at or above the "I" level so you can get familiar with what an "I" trip is, and at least one of the three should be an overnight backpack with wilderness travel.

## First Aid for the I Rating

**CPR:** same as for the O Rating.

**FIRST AID:** Candidates for the “I” rating need to complete a certified **24-hour (minimum) wilderness first aid course**, in addition to having a current CPR card. The certificate is considered current through the expiration date on the card. If your certification for CPR, standard first aid, or wilderness first aid expires before you get your rating, you will need to repeat the requirement to be current with certification.

## Environmental Awareness for the I, M, E Rating

Angeles Chapter leaders may conduct outings in such diverse ecological areas as the Sierra Nevada, the Mojave Desert, Griffith Park, local wetlands, and Malibu beach. The environmental awareness training requirement is intended to enrich your knowledge and appreciation of the natural environment. As models for our trip participants, leaders should have a general awareness of the natural environment in which we travel, share that knowledge, and practice “leave no trace” environmental ethics.

Environmental Awareness is not just Leave No Trace ethics; there is more to learn that can enhance your knowledge and demonstrate good leadership to your participants. Learn about the Sierra Club’s Conservation policies; environmental concerns, land acknowledgements and more in Chapter 2 (section on Conservation).

- You will need to provide the LTC Administrative Chair with documentation identifying a minimum of fourteen hours of environmental awareness training.
- You may lead your provisional outings before you complete the Environmental Awareness requirement, but you will need to complete it before your rating can be conferred.

You should choose environmental field study programs that are specific to the area in which you intend to lead outings.

- **Workshops:** The Angeles Chapter’s Natural Science Section conducts a Nature Knowledge Workshop each year and several Field Ecology Workshops throughout the year. These workshops are listed in the Online Schedule of Activities and on the Natural Science Section’s home page.
- **Field Study Courses:** In addition, college, university, or university extension natural science field study courses are excellent sources for specific education about our diverse California ecology. For example, community colleges often offer two-day field study courses, such as Geology and Natural History of the Eastern Sierra and A Field Study of Desert Birds, which provide appropriate environmental awareness training.
- **“Leave No Trace”** training may be used to fulfill part of the environmental awareness requirement.
- **Trail work** may also be used to fulfill part of the requirement.
- **See also Chapter 2**

The LTC Chair and the LTC Administrative Chair are authorized to approve the method of satisfying this requirement. If you have any questions, contact the LTC Admin team.

## **I Provisional Outings**

“I” provisional outings should be planned so that they are representative of the higher end of the leadership level. Because outings that barely meet the minimum standard do not provide leaders with adequate opportunities to test their leadership potential, nor allow for a thorough assessment of the provisional leaders by their evaluators, such outings will not be accepted.

### ***The I-level provisional trip requirement is to lead two trips that are rated I.***

- One trip must be an overnight backpack;
- the other may be a full day trip or a trip of two successive days with overnight car camping.
- Both must include a significant amount of off-trail wilderness travel and be of a nature that requires significant I/M-level navigation. (Travel over snow is considered off trail.) Hiking a trail to within a few hundred feet of a visible peak and then walking to the summit do not meet the test of navigating and route finding.

### ***The Request for Review of I Proposed Provisional Form.***

- The Leadership Training Committee has prepared this form for you to use in planning your provisional outings (found on the LTC Website I-Rating page, link below).
- Prior to publishing your outing, you will want to submit the form for a Navigation review (along with a Topographic Map with the planned route indicated) to ensure that it will meet the navigation requirements for a provisional outing.
- Send the form to [LTCAngelesChapter@gmail.com](mailto:LTCAngelesChapter@gmail.com).



***See “Pointers for Provisional Outings” at end of this chapter and “I Provisionals – the Navigation Component” here: [sierraclub.org/angeles/leadership-outings/i-rating](http://sierraclub.org/angeles/leadership-outings/i-rating)***

### ***Assistant Leader / Evaluators for “I” Provisional Outings***

Your Assistant Leader / Evaluating Leader needs to have been rated at the “I” level or above for two years, or have a commensurate level of experience. Exceptions to the two-year rule can be approved by the LTC Chair (send requests to the LTC Admin team at [LTCAngelesChapter@gmail.com](mailto:LTCAngelesChapter@gmail.com)).

You will need to have different evaluators for each of the two required provisional outings. Different evaluators will give a wider, more varied response. As a reminder, significant others and relatives are not suitable evaluators.

Technical proficiency, while essential, is not the only requirement for leadership. We look for judgment, breadth and depth of knowledge, interpersonal skills, and practical expertise as well.

## Technical Checkoffs (aka Checkouts) Navigation, Rock and Snow

Before you can lead I, M and E provisional outings, you must demonstrate that you have the necessary technical skills by passing a technical “Checkoff”, aka “Checkout”. Here’s how it works:

### LTC Technical Chairs

Technical Chairs for Navigation, Rock Climbing, and Snow Climbing are responsible for establishing technical requirements for each leadership level, as well as scheduling and conducting practices and checkoff outings. These are listed in the online LTC Calendar of Events on the LTC home page [sierraclub.org/angeles/leadership-outings](https://sierraclub.org/angeles/leadership-outings)

The outing description will include instructions for how to sign up for the checkoff (or practice). You will be given a list of requirements, which may include pre-reading or “homework” that you’ll be expected to have completed prior to the outing. As a result, we recommend that you sign up well in advance.

Technical Chairs appoint examiners who perform the checkoffs to determine whether you have demonstrated the required skills. In each of the exercises, examiners will also be assessing your knowledge of the material, your preparation and execution, ability, judgment, and leadership qualities.

You must not only perform the exercises at an appropriate skill level, but you must also demonstrate an understanding of how they work and why they are important, as well as an ability to communicate those concepts to others.

- Navigation checkoff requirements for leading off-trail trips at the I/M and E Level are found in Chapter 6: Navigation.
- The technical checkoff requirements for leading Rock Climbing on 3rd and 4th class terrain are described in Chapter 7.
- The technical checkoff requirements for Snow Climbing on the equivalent of 3rd and 4th class terrain are described in Chapter 8, and the form is here:



**Forms available here:** <https://www.sierraclub.org/angeles/leadership-outings/m-e-forms>

The preferred way to demonstrate your skills is to attend a scheduled LTC Checkoff event. However, with prior approval of the Technical Chair, examiners have the authority to perform a checkoff at times or places that they deem proper, and they may also grant a checkoff based upon direct personal knowledge of your skill. The Technical Chair has the final approval of an LTC checkoff. (“T” rated outings require demonstration of the applicable technical skill to the sponsoring GSC).

You are encouraged to practice as often as you need before checking off, but you can’t practice and attempt a checkoff on the same day. Checkoffs are often scheduled as two-day outings, with the first day planned as a practice, with the checkoff the following day.

## How to “Ace” Your Technical Checkoff

- > Practice, practice, practice - can you teach the skill to someone else?
- > Do the homework well in advance, not the night before the checkoff
- > Don't be a no-show! That shows poor leadership
- > Don't lose your navigation examiner.... that shows poor leadership
- > Be receptive to feedback, ask questions
- > Sign up early, relax - and have fun!

- If you don't pass the checkoff, you will be assigned to a different examiner (if possible) at the next one you attend.

- For Rock and Snow, if you fail to pass a checkoff two times in one year you'll need to wait a year before trying again (unless the Technical Chair agrees to make an exception). This gives you time to learn and practice the skills.

- There is no “two times in one year” limit for Navigation checkoffs.

Upon completion of the checkoff, you'll be notified whether you passed. The Technical Chair will also let the LTC Admin know, so your records can be updated.

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## After Your Provisional Outings

**Evaluations:** Upon completion of your provisional outings, send your provisional leader self-evaluation and your assistant leader's evaluation to [LTCAngelesChapter@gmail.com](mailto:LTCAngelesChapter@gmail.com). The LTC Admin team will review your records for completeness and may forward your evaluations to the Safety Committee with a recommendation for certification. Only the Safety Committee can certify leader candidates to lead outings for the Angeles Chapter.

**Certification:** Completion of technical checkoffs and provisional leads does not guarantee automatic certification by the Safety Committee. Because becoming an Angeles Chapter leader is a privilege, not a right, the LTC reserves the right not to approve a potential leader if it deems that the candidate lacks sufficient leadership qualities such as judgment, character, and the ability to work with people.

The LTC Chair or the Safety Committee may require candidates to gain more experience, develop higher technical and/or leadership skills, or lead additional provisional outings before being certified at a specific leadership level.

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## A Progress Check List

Leadership candidates set their own timetable for completion of the LTP. If no progress has been made in twenty-four months, however, your file will be made inactive. Reinstatement to active status is at the discretion of the LTC. You may be asked to repeat some, or all, of the requirements.



Keep the LTC Admin (and your OC) informed of changes in your contact information, and you should also make updates through Sierra Club Membership Services: [membership.services@sierraclub.org](mailto:membership.services@sierraclub.org)

If you wish to progress from one leader category (O-1 to I, for example), make sure that you inform the LTC Admin, and review the LRB and the LTC website pages for information on what is required.

<b>PROGRESS CHECKLIST</b>					
<i>This checklist is a summary of completion requirements and may help candidates track their own progress. Keep a copy of your certifications and publications of your provisional outings and evaluations.</i>					
<b>Name</b>			<b>CPR Date / Provider</b>		
<b>Club member #</b>		<b>Expiration</b>	<b>SFA Date / Provider</b>		
			<b>WFA Date / Provider</b>		
<b>LTP Seminar</b>					
<b>ANGELES CHAPTER EXPERIENCE TRIPS</b>					
	<b>Date</b>	<b>GSC</b>	<b>Level</b>	<b>Destination</b>	<b>Backpack? Y/N</b>
1					
2					
3					
4					
5					
<b>TECHNICAL CHECKOFFS (CHECKOUTS)</b>					
	<b>Date</b>	<b>Level</b>	<b>Location</b>	<b>Examiner</b>	
<b>Navigation</b>					
<b>Rock</b>					
<b>Snow</b>					
<b>OTHER REQUIREMENTS</b>					
<b>M EXAM date</b>		<b>E EXAM date</b>			
<b>Environmental Awareness 1</b>		<b>Environmental Awareness 2</b>			
<b>PROVISIONAL OUTINGS</b>					
	<b>Date</b>	<b>GSC</b>	<b>Level</b>	<b>Destination</b>	<b>Evaluator</b>
1					
2					
3					
<b>PROVISIONAL LEAD COMMITTEE (M/E) DATE:</b>					
<b>SUBMISSION OF PAPERWORK and RATING GRANTED DATES</b>					

## Advanced Ratings: M and E

**M-level outings** (M-Rock, M-Snow, M) include skills for leading Class 3 rock climbs (frequent use of hands for upward progress) and moderate snow climbs, which may require the use of an ice axe, as well as navigation skills. M-rock leaders may not lead moderate snow climbs; M-snow leaders may not lead class 3 rock climbs.

**E-level outings** (E-Rock, E-Snow, E) add skills for leading Class 4 rock (consistent use of the hands for upward progress and more exposure to falling) with a rope, anchors, protection, and belays; steep snow climbs that require the use of ice axe and crampons and may require roped travel and belays; and advanced navigation, which may require the use of an altimeter.

### Restricted Mountaineering Outings

**All E-level and most M-level outings fall into the category of Sierra Club restricted outings.** Any outing requiring the use of ice axe, crampons, or a rope is, by definition, a restricted mountaineering outing.

In contrast, an example of an *unrestricted* M-level outing is one with easy class 3 rock *without* exposure; the leader would reasonably expect that no one screened for the outing would request a belay. Although permissible to use a rope for safety in unanticipated conditions on an unrestricted M-level outing, it may be used only to retreat, not to continue toward a summit. For example, rain may make rock slick and dangerous, barring safe upward progress and causing concerns about safety for a descent; a leader may belay climbers down in such a situation.



***Open only to Sierra Club members, restricted outings need to be approved by the Mountaineering Oversight Committee.***

### MOUNTAINEERING OVERSIGHT COMMITTEE (MOC)

The National Sierra Club committee that oversees and approves all restricted outings, to ensure that the Sierra Club runs as safe a program as possible. The MOC members have expertise in mountaineering and rock climbing. MOC has the following duties::

- Certification of entities to sponsor mountaineering outings
- Review of all proposed mountaineering outings to ensure that:
  - a. the leaders are qualified to lead the proposed outing;
  - b. the outing is properly conceived and well-planned;
  - c. the leader will be screening potential participants for the proper experience, physical ability and equipment.

The MOC works with leaders to ensure that mountaineering outings will attract participants and are run with the safety of the participants as a paramount consideration. Applications for restricted mountaineering outings (MOC application) are found on the LTC website.

## THE PROVISIONAL LEAD COMMITTEE (PLC)

The Provisional Lead Committee (PLC) reviews all M and E provisional plans. Its members are the LTC Chair and Vice-Chair, Rock Chair, Snow Chair, Navigation Chair, and the LTC Administrative Chair.

Send the following to the Provisional Lead Committee at [LTCProvisionalLeadCommittee@gmail.com](mailto:LTCProvisionalLeadCommittee@gmail.com)

- M/E exam (for review and evaluation)
- Requests for Provisional status - include a comprehensive climbing resume, and indicate which specific rating you are requesting (ie M-Rock, M-Snow, Full-M)
- Requests for approval of planned provisional outings and evaluators. Include a draft MOC application.

The PLC will review the candidate information and PLC members will vote to approve or deny the request within seven (7) days of receiving the request.

## The M Ratings

**M rating** (“Full M”): Qualified to lead all M-level outings—rock, snow, or rock and snow combined

**M-rock rating**: Qualified to lead all M-rated outings where M-level rock travel (but no M-level snow travel) is required

**M-snow rating**: Qualified to lead all M-rated outings where M-level snow travel (but no M-level rock travel) is required.

Training and certification for the M-rock [snow] rating is based on current standards for becoming a provisional leader for the M-rating, including

- Be an I-rated leader (or see below for new leader candidates and O-rated leaders)
- Pass an M rock or snow technical checkoff
- Be current in wilderness first aid (24+ hours for provisional candidates) and CPR for provisional candidates
- Complete an M-level written exam
- Provide evidence in a climbing resume of experience on an appropriate number of rock [snow] experience trips at Class 3 or higher to reach provisional status, as assessed by the Provisional Lead Committee of LTC
- For M-rock: lead a provisional outing including at least 100 feet of 3rd class rock climbing
- For M-snow: lead a provisional outing consisting of at least 400 feet of elevation gain on a snow slope between 25 and 35 degrees and requiring the use of an ice axe.

If a leader candidate for M-rock or M-snow is **not a rated leader or is an O-rated leader**, these are the additional requirements:

- Complete 14 hours of environmental awareness training
- Pass the I/M-level navigation check-off
- If you are NOT an "I" rated leader, you need to lead two provisionals (not just one). Both of them must include a strong navigational component. One of the outings must comply with the M level technical requirements, and the other may be either at the "M" or at the "I" level.

For a **Full M (both rock and snow)**, the basic requirements are the same, but include two restricted M-level outings, one on rock and one on snow.

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## The E Ratings

**E rating ("Full" E):** Qualified to lead all currently-defined E-level outings—rock, snow, or rock and snow combined.

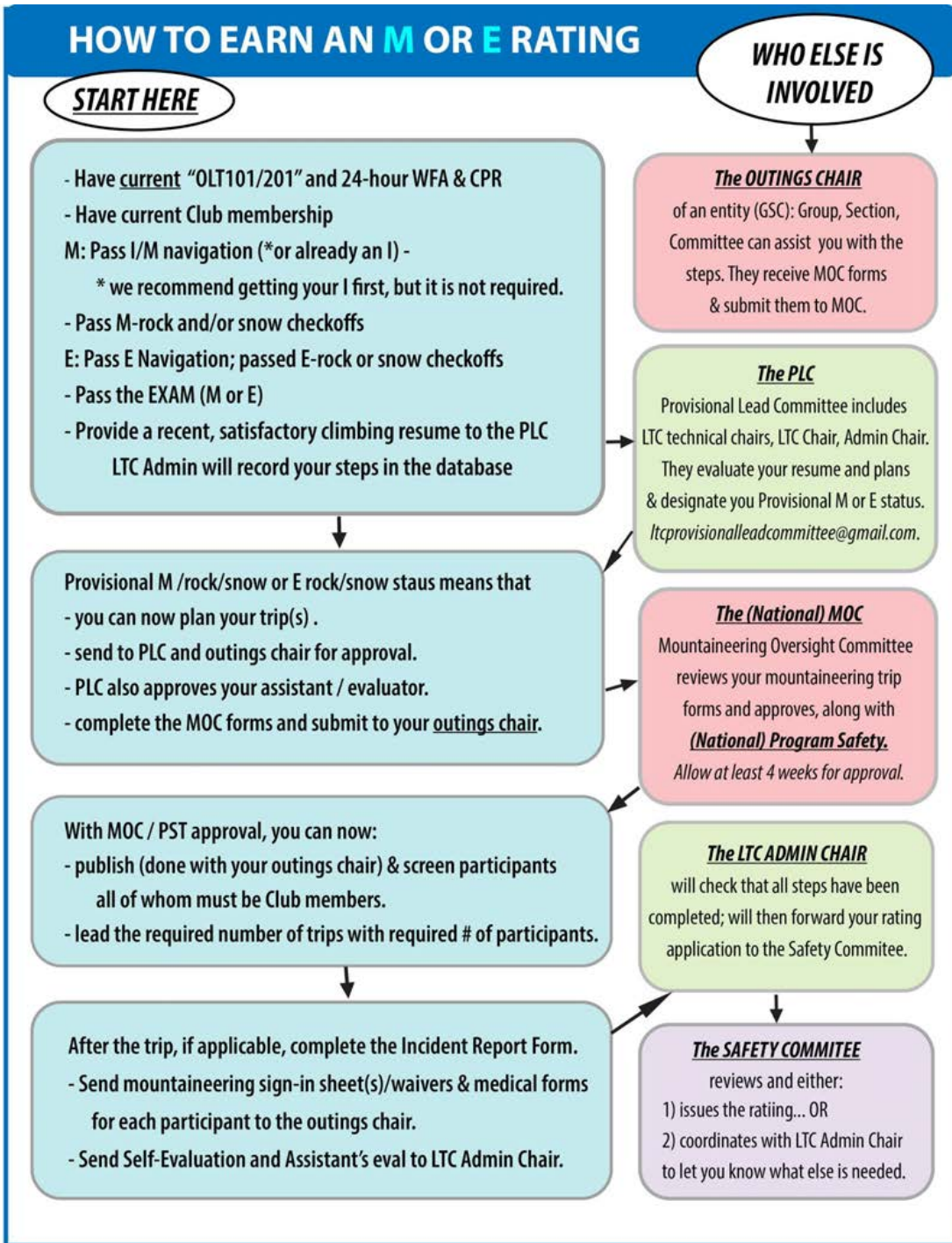
**E-rock rating:** Qualified to lead all currently-defined E-rated outings where E-level rock travel (but no E-level snow travel) is required

**E-snow rating:** Qualified to lead all currently-defined E-rated outings where E-level snow travel (but no E-level rock travel) is required

For a **Full E (both rock and snow)**, the basic requirements are the same. Training and certification for the E-rock or E-snow rating are based on the following standards:

- Pass the applicable E-technical checkoff (rock for E-rock or snow for E snow) and the E-level navigation checkoff
- Provide evidence in a climbing resume of experience on an appropriate number of rock/snow experience trips at Class 4 or higher to reach provisional status, as assessed by the Provisional Lead Committee of LTC
- **For E-rock:** lead two provisional outings including at least 200 feet of 4th class rock climbing that requires the use of ropes and belays.
- **For E-snow:** lead two provisional outings consisting of at least 800 feet of elevation gain on a snow slope greater than 35 degrees requiring the use of an ice axe and crampons.
- All provisional E outings must be approved by the LTC's Provisional Lead Committee and the national Mountaineering Oversight Committee.
- Complete an E-level written exam.

**If a candidate first obtains an E-rock or E-snow rating, the candidate needs to complete one additional provisional outing on the applicable terrain for the full E-rating.**



### M / E Experience Outings

For M and E level, at least three of the five experience outings must include wilderness travel with overnight backpacking. You also must have prior mountaineering experience. At a minimum you must have participated on at least five experience climbs that are solidly M or E rated; this experience does not have to be gained entirely on Angeles Chapter Outings.

The Provisional Lead Committee will review your climbing resume in conjunction with your request to become a provisional M or E leader. They may require you to gain more mountaineering experience before making you a provisional leader.

### **M / E Examination**

Candidates for the M and E levels must complete a written examination **before** applying to the Provisional Lead Committee to lead provisional outings. The exam is found on the LTC web site under Forms and Advanced Ratings.

Complete it at home and email it back to the Provisional Lead Committee, who will assign it to a designated LTC member for evaluation. If the exam is satisfactory, the evaluator will return the exam to you with comments and will make sure your records are updated accordingly.

### **M / E Provisional Status**

When you have completed the requirements to become a provisional leader, including passing the exam, you need to email the Provisional Lead Committee to request provisional status.

- Indicate the specific rating you are seeking: M-Rock, M-Snow, M, E-Rock, E-Snow or E.
- Include your snow- and rock-climbing resume. Here is a sample: [Mountaineering Resume](#)
- The resume should detail M and E climbs (Angeles Chapter outings or their equivalent) during the last three years. You will want to keep this resume up to date, even after you get your rating.

The Provisional Lead Committee will approve or disapprove the potential leader to lead provisional trips based on what it considers sufficient experience in the kinds of trips that Angeles Chapter M and E leaders typically lead. You might be asked to gain more experience before that stage.

### **M/E Provisional Outings and Assistant/Evaluators**

The Provisional Lead Committee also reviews M- and E-level provisional outings and evaluates assistant leaders. Submit your proposed provisional outing, current climbing resume' for both yourself and your assistant / evaluator, along with a draft Mountaineering Oversight Committee (MOC) application ("non-training") to [LTCProvisionalLeadCommittee@gmail.com](mailto:LTCProvisionalLeadCommittee@gmail.com).

Mountain Oversight Committee (MOC) applications are here for "non-training" outings and "training" outings: <https://www.sierraclub.org/angeles/leadership-outings/m-e-forms>

M/E provisional outings should be planned so that they are representative of the higher end of the leadership level. Because outings that barely meet the minimum standard do not provide leaders with adequate opportunities to test their leadership potential, nor allow for a thorough assessment of the provisional leaders by their evaluators, such outings will not be accepted.

Your Assistant Leader / Evaluating Leader needs to have been rated at the appropriate M/E level for two years, or have a commensurate level of experience. Exceptions to the two-year rule can be approved by the Provisional Lead Committee.

You will need to have different evaluators for each of the required provisional outings, if possible, or obtain a waiver from the PLC. Different evaluators will give a wider, more varied response.

M leaders should aim to have at least six participants on their provisional outings if possible; this is particularly important if you have no history of leading groups as an Angeles Chapter leader (e.g., as an O-1/O-2 or “I” rated leader).

### **After Your Mountaineering Outings**

***Forms: After the outing, the leader sends forms as follows***

- Mountaineering [Sign-In Sheet and Liability Waiver](#), including membership numbers, signed by each participant. Send to sponsoring entity outings chair.
- [Medical Screening Form](#) from each member. Send to sponsoring entity outings chair.
  - See later in this chapter for more about these forms.
- An [Incident Report Form](#) *if applicable*. Follow instructions on the form.

#### ***Provisional Evaluation Forms***

*Submit your provisional leader self-evaluation and your assistant leader’s evaluation to the LTC Admin who will review for completeness and forward over to the Safety Committee for certification consideration.*

#### ***Certification***

*You may be asked to lead another provisional if the LTC and/or Safety Committee considers the number of participants on a provisional outing to be too low for the demonstration of group management skills. In some circumstances LTC and the Safety Committee may jointly waive this requirement of a minimum number of participants.*

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### **M /E Provisional Outings – WTC Students**

Wilderness Travel Course (WTC) students are not trained for trips at the M or E level, and thus M- and E-level provisional trips should not generally be led as WTC experience trips. WTC Student participants should be carefully screened for appropriate skills. (Students need to complete several outings to graduate from WTC.)

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## MAINTAINING A LEADER RATING

### Staying Current: OLT 101 and OLT 201

To maintain your leader rating, you must “refresh” OLT 101 training every 4 years in order to stay current with Club and Chapter policies.. You can do that by reviewing information here:

[.sierraclub.org/angeles/leadership-outings/olt101](https://www.sierraclub.org/angeles/leadership-outings/olt101)



*The LTP seminar is considered the equivalent of the higher-level (National) course, OLT 201 (Level 2) and once you take the seminar, your “201” - which consists of materials covering overnight trips - does not need renewal.*

### Staying Current: First Aid, CPR, and WFA

- Currency is based on the expiration date on the card, typically two years for Standard or Basic FA and three years for WFA 24-hour or two years for a 16-hour (NOLS or other) refresher.
- Be sure that the course that you take is primarily basic or standard First Aid to satisfy the refresher requirement.
- CPR does not need to be renewed unless you are going for a higher rating, or lead for ICO or international trips, or are a WTC group leader. Check with your outings chair.
- Online First Aid courses such as FirstAidWeb.com are a form of continuing education and are only acceptable every other time a leader renews this requirement. Leaders should be aware of this before they renew.
- You may have multiple types of FA in your database record. Having only one of them current meets this requirement. You may get an automatic email about any of these that are expiring. Contact your outings chair, or LTC with questions. They can delete obsolete records.
- To ensure that our leaders are in compliance, members of Safety/LTC/OMC along with your outings chair have been updating database records to ensure currency.

#### ***Other Considerations***

A physician, nurse, or other currently practicing medical professional need not take a basic first aid course if they have first aid knowledge equivalent to or higher than American Red Cross Basic. For the I or higher rating, WFA may be required.

- Medical professionals: you may need to send us your card so that we can record the information and dates. If you are going for an I or above, you also may want to consult with [Steve Schuster](#), LTC First Aid Chair on your WFA needs.
- Certain entities such as ICO may have their own requirements. Contact the outings chair.



## **Wilderness First Aid**

As noted in this Chapter, I/M/E candidates must take and be current in 24-hour WFA or higher + CPR

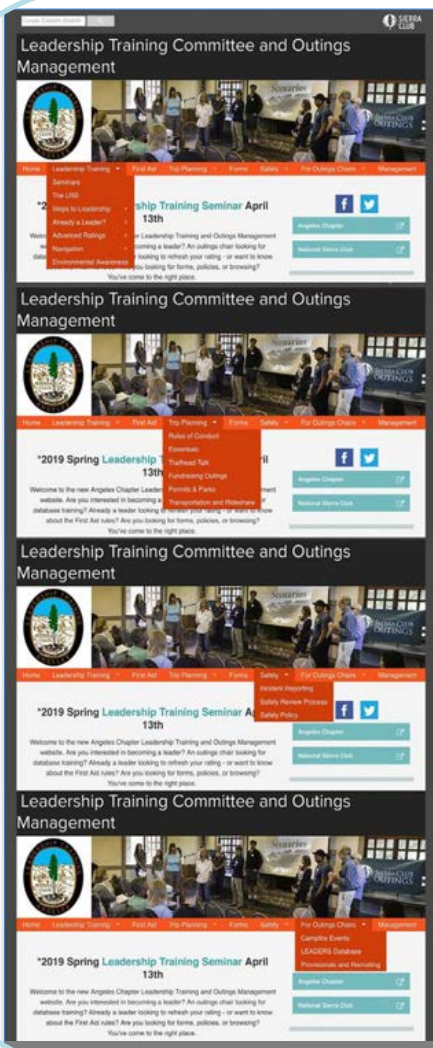
- To refresh / stay current, I/M/E rated leaders may take a 16-hour refresher.
- There is no such thing as a "grace period" during which you may be considered certified after expiration date; if a course has that language, it means that you may have a period of time during which you can recertify without starting over.
- For M-restricted and E level outings, one of the two leaders must be current in WFA (16-hour minimum); the other current in (at least) Standard FA.
- If an I or M leader wishes to advance their rating, they must be current in a 24-hour or above WFA + CPR.
- Wilderness Travel Course (WTC) has its own WFA/CPR policy that applies to group leaders.
- Currency is based on the expiration date of the provider's card.
- No online courses are accepted for WFA refreshing.
- We always recommend the 24+hour courses for the most depth of information.

## **Staying Current: Experience/Skills**

All Leaders are expected to maintain the appropriate level of experience and skills applicable to the level of outing they will lead. A generally accepted way of maintaining experience and skills is to lead a trip at a similar level within the last four years.

If you haven't led a trip at a similar level within the past four years, you will need to provide the sponsoring GSC Outings Chair with information showing that you have maintained your experience and skills. After review, if you haven't led a similar trip within the past four years, the entity Outings Chair may request that you conduct the next trip as a provisional leader and/or attend technical training outings as part of the refresher process. Upon completion, trip evaluation reports by the evaluator and leader should be sent to the GSC Outings Chair who can then allow you to continue to lead for the entity.

## HOW TO USE THE LTC WEBSITE



All top level menu items have good information and they also have dropdowns. You will see more pages and submenus as you dig deeper.

**Home** - no dropdowns but this page has the LTC training events calendar.

**Leadership Training** dropdown includes the Seminar, the LRB, Steps to Leadership (and subpages on the O and I ratings); Advanced Ratings pages, Navigation. Already a Leader? is about refreshing your rating.

**First Aid** is just that: First Aid & WFA.

**Trip Planning** dropdown: Rules of Conduct, Essentials, Trailhead Talk, Fundraising Outings, Permits and Parks, Transportation & Ridesharing.

**Forms** is Forms!

**Safety** dropdown: Incident Reporting, Safety Review Process, Safety Policy.

**For Outings Chairs:** Campfire Events, LEADERS Database, Provisionals and Recruiting

**Management** - your management contacts and more

## Questions and Resources

- Questions concerning LTP progress and requirements should be directed to the LTC Admin Chair at [LTCAngelesChapter@gmail.com](mailto:LTCAngelesChapter@gmail.com).
- Provisional Lead Committee (for M and E candidates): [LTCProvisionalLeadCommittee@gmail.com](mailto:LTCProvisionalLeadCommittee@gmail.com)
- M/E forms are under "Forms" and [sierraclub.org/angeles/leadership-outings/m-e-forms](http://sierraclub.org/angeles/leadership-outings/m-e-forms)
- Questions about first aid, navigation, rock climbing, or snow climbing, send them to the respective Technical Chairs. See <https://www.sierraclub.org/angeles/leadership-outings/management>
- OMC Chair: [omc@angelkes.sierraclub.org](mailto:omc@angelkes.sierraclub.org)
- Ombudspople: [ombudsman@angeles.sierraclub.org](mailto:ombudsman@angeles.sierraclub.org)
  - LTC webmaster [tcwebmaster@angeles.sierraclub.org](mailto:tcwebmaster@angeles.sierraclub.org)



See Chapter 2 for Chapter and Sierra Club org charts and contacts.

## **Leadership Training Events**

Upcoming Leadership Training Committee practices and technical checkoffs can be found on the LTC website Home page: <https://www.sierraclub.org/angeles/leadership-outings>  
Events are also found in the Chapter Schedule of Activities <https://angeles.sierraclub.org/activities>

# **PROVISIONAL LEAD POINTERS FOR I, M and E**

## **General Reminders**

1. The evaluating assistant leader shall not be someone with a close relationship with the provisional leader, i. e., a spouse, partner, or close relative.
2. The evaluating leader shall have been a leader at the level of the outing for two or more years or have significant experience leading at that level and have been granted a waiver by the LTC Chair.
3. For I-, M-, and E-level provisional outings, the outing should be solidly within that level, not at the lower end of it.

## **Scheduling Provisional Leads**

1. With the approval of the sponsoring GSC Outings Chair, you may schedule and publish your provisional outing before you've completed all the requirements to become a provisional leader. However, this requires that you have a reasonable plan to complete the prerequisites before the trip date, and the Outings Chair needs to notify the Safety Committee as well as actively monitor your progress.
2. With the ability to publish trips immediately to the online Schedule of Activities, the need for this should be limited. Exceptions would be reasonable when needed to meet the publication deadlines for printed or online newsletters.
3. A problem arises, however, if you have not been able to meet all the requirements by the date of the provisional lead. In this case, you have several options:
4. The outing may be postponed until after the requirements are met. You should have a firm date in mind to communicate to would-be participants of the originally scheduled outing;
5. Another appropriately-rated leader may take over the trip for you, and you may schedule another outing for a later date; you may not participate in any leadership capacity on the original outing if you choose to join as a participant.
6. The outing may be canceled.



## **Meeting Navigation Requirements for I-, M-, and E-level Provisional Outings**

- If M- and E-level provisional leaders are already I-rated or M-rated, their provisional outings do not need to be planned to demonstrate navigational skill. They will be expected to navigate well and show good route-finding skills, of course, but the outings do not have to be planned with significant navigation as one of the factors.
- M- or E-level provisional leaders who are not already I- or M-rated need to demonstrate navigational skill on two of their provisionals, as would be expected of an I-level provisional leader.

- Note that Passing the E-level navigation checkoff is a sufficient demonstration of that skill level.
- I-level provisional outings (and M- and E-level for provisional leaders who are not already I- or M-rated) need to allow the provisional leader to demonstrate navigation and not only route-finding skills. The following are some clarifications and amplifications.
  1. The route must involve cross-country travel, i.e., routes that are not on roads, maintained trails, or use trails and ducked routes that are known to be reliable. Occasional encounters with use trails or ducked routes will not prevent a route from being considered cross-country.
  2. The objective and/or significant portions of the route to it should not be visible from the point of departure from the trail, i.e., simply leaving the trail to take an obvious route to a nearby visible objective does not demonstrate navigation skill. A summit visible from the trail would be acceptable only if the route involved a navigational challenge (i.e., the summit is visible from the trail but not for most of the route).
  3. Cross-country routes should be significantly different from available trails. Simply staying off a trail while walking essentially the same route does not demonstrate navigation skill.

The route will require the leader to make important decisions that require navigation skill and correct judgment such as traveling on a bearing in a forest or desert; choosing the appropriate gully, drainage, ridge, etc. to follow or cross while ascending and/or descending; etc.



**The following are *unacceptable* for demonstrating navigational skill:**

- Going up or down a long ridge that has no forks or where there is no choice between ridges
- Going up or down a long gully that does not have major tributaries and changes in direction or where there is no choice between one or more gullies
- Gentle, open, featureless, or low-relief terrain on the topo and to the eye that is simple and easy to follow
- Destinations in the Sierra Nevada or elsewhere where normal routes clearly do not involve sufficient navigation for a provisional lead, such as Mt. Agassiz, Cirque Peak, Mt. Goode, Mt. Lamarck, Mt. Tom, Vogelsang Peak.



**Generally acceptable demonstrations of navigational skill include:**

- cross-country in broken terrain with visibility limited to nearby features because of the terrain (may include finding passes or gullies in the mountains and key up or down turnoffs to achieve a planned route)
- cross-country navigation in a heavy forest with broken terrain
- cross-country navigation in broken terrain on snow where there are no trail markers or pre-existing trail
- cross-country to normally easy objectives using alternate routes of much greater navigation difficulty. Be sure it is a feasible, likely route, however, and not one contorted to demonstrate navigation.

Off-trail navigation is “significant” when it provides a meaningful demonstration that the candidate can make practical use in a real trip situation of the types of skills that are tested in the exercises of the I/M navigation checkoff.

Neither the navigational problems nor the travel needs to be more difficult than the checkoff. This is not a test of climbing skill or the ability to conduct arduous travel over rough terrain.

*The only navigation aids permitted for provisional leaders are map, compass, and altimeter. If the altimeter used is integral to a GPS receiver, the leader may not use the GPS “pages” on the instrument. A GPS may not be used to navigate or to mark waypoints to be followed later. The provisional leader may also not rely on the navigational advice or directions from others in the group.*

### **Here are some suggestions**

- Lead an outing to one of the many desert peaks that are not visible from the trail (if any) or cars;
- Lead an outing to an HPS peak by a different route in which the peak is not visible from the point of departure from the trail; this should be a route without a known, clear use trail and with some sort of navigational challenge
- Lead an outing that requires navigation through forest;
- Lead an outing other than a peak climb that involves cross-country navigation, such as a cross- country trip through western Sierra forest to visit a lake or some other feature not visible from or easily deduced from the take-off point from the trail; there is no requirement that an I-level provisional outing include a peak climb, and candidates would be well-advised to consider interesting non- peak objectives that require significant off-trail navigation.

The LTP checkoff process previously certified the provisional leader’s basic navigation competence, whether I/M or E. The provisional leader simply needs to demonstrate appropriate use of the navigation skills during a real-life group-led situation, not on any contorted provisional navigation route.

The LTP has always encouraged scouting the provisional trip (and other outings), which is a good strategy for experience and safety reasons. In scouting the provisional trip route, however, the provisional leader has then already navigated the route. This is entirely acceptable. In analogous provisional rock and snow situations (M and E), the provisional leader, having scouted, would simply perform all the technical moves correctly again. Same for navigation. You are required to demonstrate the navigation skills and decision-making steps to the evaluating leader regardless of having scouted the outing.

You are encouraged to consult with your assistant/evaluating leader, or your leader mentor, and/or the outings chair of the sponsoring G/S/C in planning your provisional outing. You are also encouraged to submit the proposed provisional to LTC for a navigation review to ensure the acceptability of the proposed outing as a provisional lead.

**A form to help in planning the provisional outing can be found on the LTC website:**

**<https://www.sierraclub.org/angeles/leadership-outings/i-rating>**

Finally, the assistant leader is responsible to determine the adequacy of the provisional leader’s performance, not only for navigation but all other aspects of the outing. The assistant leader may ask questions or take actions like those of a navigation examiner during an LTP checkoff and may pose challenges or problems for the provisional leader to solve along the way



## Meeting Route-finding Requirements for I, M, and E Provisional Outings

- A. Route finding is a different skill than navigation, but demonstrations of both are required for cross-country travel.
- B. Route finding involves the small-scale decisions of the leader in determining the route through terrain that is not obvious. This is a learned skill developed by experience on various types of terrain.
- C. On many peak climbs the “listed” routes follow a relatively easy route up the peak with more difficult ground on either side. The listed route may be second class or I rated, but to either side it may be third class or full of dense brush. How well the leader does in discerning the route will keep the group on the easiest ground and within the rating classification of the outing.
- D. The assistant leader should evaluate the leader candidate on route-finding decisions and the leader’s awareness and handling of the group dynamics and abilities on the different types of terrain.
- E. A provisional leader may need to consider such route-finding options as
  - Making a side-hill traverse vs. a descent and regain of altitude
  - Ascending or descending scree and/or talus
  - Traveling across large talus or small talus blocks
  - Going around a difficult patch of terrain or across it
  - Selecting stream-crossing points where no bridge is available
  - Choosing between travel on snow or on adjacent rocks
  - Going through the brush or over other terrain
  - Deciding to go around fallen logs or over them.
- F. Route finding may also require management of the group whenever there is a possibility of rock fall or loose terrain.
- G. Such route-finding decisions not only indicate skills in reading terrain but also in estimating overall time required for a group, considering energy requirements for various options, and relating the time and energy aspects to the trip participants and the trip plan.
- H. Screening of participants comes into play as well as the adequacy of the trip plan for the time required to negotiate the terrain.



Onward to Chapter Two




# The Sierra Club, Conservation and Outings Programs

## The Sierra Club Mission

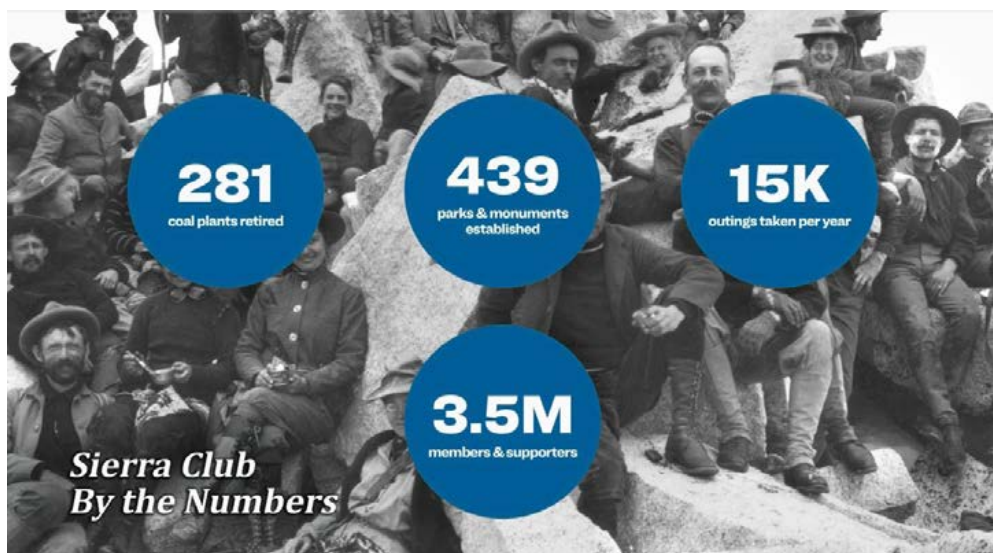
*To explore, enjoy and protect the planet. To practice and promote the responsible use of the earth's ecosystems and resources; to educate and enlist humanity to protect and restore the quality of the natural and human environment; and to use all lawful means to carry out those objectives.*

**In the coming decades, the Sierra Club will enlist, inspire and empower humanity to:**



- 1** *Achieve Ambitious and Just Climate Solutions.*
- 2** *Explore, Enjoy, and Protect Our Nation's Lands, Waters, Air, and Wildlife.*
- 3** *Engage and Support a Broad, Diverse, Inclusive, and Powerful Movement.*
- 4** *Become an Ever Stronger, High-Performance Organization.*

The Sierra Club differs from all other conservation organizations in several important ways. No other organization chooses the members of both its local and national policy-making bodies through contested elections in which all members are encouraged to participate. No other organization has a network of volunteers that is as extensive as that of the Sierra Club or leads as many outings as the Sierra Club does. When David Brower was hired as the Sierra Club's first conservation staff member in 1952, the Sierra Club already had a tradition of volunteer leadership that was sixty years old. That tradition of activism and volunteer control of policy has continued to grow as the issues have become more complex and the size of the Sierra Club has multiplied. The result has been an increasingly complicated organizational structure, which still embodies the democratic principles of the Sierra Club's earlier days.



**Supporters and Activists:**  
**Sierra Club Chapters:**  
**The Angeles Chapter**

**3.5 million**  
**64 in the USA, including Puerto Rico**  
**40,000+ members. Has 15 regional groups,**  
**27+ recreational sections and committees,**  
**task forces, plus political and conservation committees**  
**focused on a variety of regional and national issues.**

## How the Sierra Club is Organized

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

As a 501(c)4 non-profit organization, the Sierra Club lobbies for environmental issues as part of its mission. The Sierra Club Foundation is the 501(c)3 arm which provides grants for programs that meet the environmental mission of the Club. Learn about the Club’s founding and history - see links at the end of this chapter..

**The Board of Directors (BoD)** are elected to serve the membership in deciding policy, conducting governance, and keeping the Club effective in pursuing our key mission. As the Club's highest governing body, the BoD consists of 15 members, five of whom stand for election every year. The Board's Executive Committee (ExCom) consists of the President, Vice President, Secretary, Treasurer, and Fifth Officer. The Board meets regularly at the headquarters in Oakland and around the country.

The BoD works with the broader leadership through Sierra Club teams and committees, which are divided into two groups, those that advise the board and those that are empowered to act:

### Board Advisory Committees

Finance and Risk Management, Mission Strategy, Visibility and Outreach Volunteer Leadership Task Forces and Board Standing Committees.

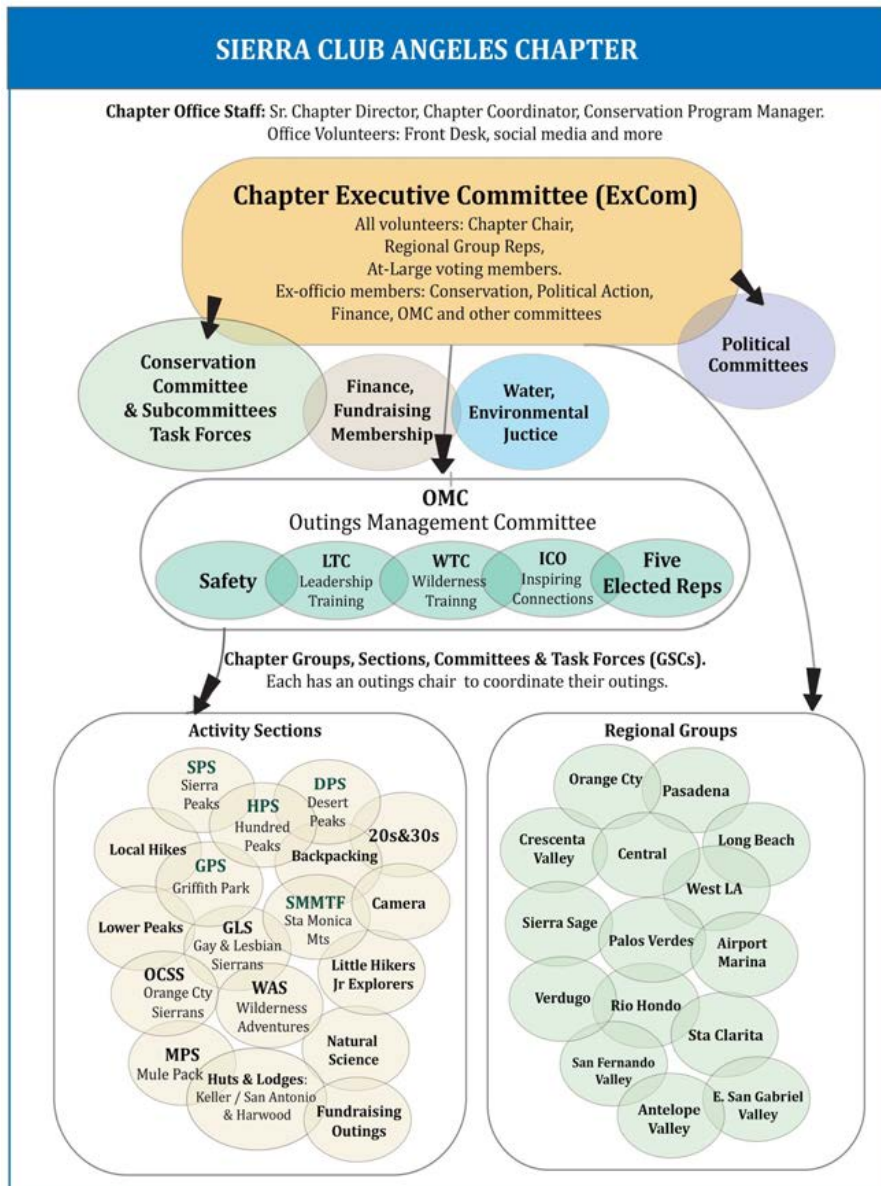


## National Action Teams

Chapter and Leader Support Campaigns and Programs; Climate Recovery Campaign Teams; Program Teams (Outdoor Activities is here!) and Activist Network.

**The Sierra Club's 64 chapters** are geographically defined areas of Sierra Club membership, organized according to standards set in the Sierra Club bylaws. Chapters are officially sanctioned by the board to operate Sierra Club programs and are partially funded by an allocation from the national Sierra Club.

## The Angeles Chapter



It took a while from the Sierra Club's founding in 1892 to get around to the creation of the first local chapter in 1911. That year marked the start of the Southern California Section, which became the Southern California Chapter and, finally, the Angeles Chapter, which includes Orange County and has over 40,000 members, 27+ activity sections and 15 regional groups, not to mention conservation and political committees and task forces.

Angeles Chapter Office staff consists of volunteers and interns handling outreach, social media, communications and publications (*Southern Sierran / SoCal Now*) as well as a treasurer and phone answering team.

*All Sierra Club meetings are open to Sierra Club members and to the general public, except for rare executive sessions when sensitive issues (such as personnel or lawsuits) are discussed.*

# Outings

## National Outings Programs

The Sierra Club goes outside with over 270,000 people each year through a variety of programs and a campaign designed to create lifelong connections to nature. Programs and campaigns include: Inspiring Connections Outdoors, Local Outings, Military Outdoors, National Outings, Outdoors for All campaign and all outings led as a campaign tactic of other Sierra Club campaigns.

**INSPIRING CONNECTIONS OUTDOORS (ICO):** THE ICO program works with youth, specifically those who have been underrepresented or have felt unwelcome in environmental and outdoor groups in the past. 800 outings in approximately 45 ICO groups host approximately 13,000 youth and adults annually.

**MILITARY OUTDOORS:** Ensuring those who defended our country and their families get to enjoy the land they served. The Sierra Club provides a variety of opportunities for military service members and their families to find adventure, camaraderie, a sense of mission, and relaxation through outdoor experiences.

**NATIONAL OUTINGS:** 350 paid tours and treks serving 3,800 participants annually. Sierra Club National Outings is overseen by the Outings Committee, which delegates much of its work to its eighteen subcommittees. Some of the subcommittees offer trips in a particular geographic region (e.g., Alaska, Southwest, Rocky Mountains, Northeast), while other subcommittees run specific types of trips (e.g., International, Service, Water). This outings program is continually seeking new leaders and welcomes chapter outing leaders to participate in the program. Chapter outing leaders or others who are interested may become involved by attending subcommittee meetings or by participating in the various leader training programs which are run by the national outings program. See Contacts and Resources at the end of this chapter.

**OUTDOORS FOR ALL:** The goal of Outdoors for All is to improve access to the outdoors for all people to improve their lives while inspiring them to protect the environment, particularly in the face of the life-threatening crisis of global climate change. Outdoors for All is one of three priority initiatives of the Our Wild America Campaign, the goal of which is to create a powerful grassroots movement to protect America's public lands and connect people to the outdoors for the benefit of both.

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## The Angeles Chapter Outings Program

Over two thousand outings each year are conducted under the sponsorship of the Angeles Chapter and its entities, far more than those of any other Sierra Club chapter. This program is the result of the work of hundreds of volunteers under a chapter organizational structure, which is specially designed to encourage enjoyable, efficient, and safe outings at all levels.

Chapter outings are conceived, planned, and executed by outing leaders associated with the regional groups, special activity sections, activity committees, and training committees. The management committees of the sponsoring groups, sections, and committees (GSC) are responsible for all aspects of their trips (e.g., planning, leaders' qualifications, and outing procedures). Each GSC may have its own

outings policies and procedures, which must comply with the chapter Safety Policy and be approved by the Chapter Safety Committee.



Chapter GSCs sponsor regularly-scheduled conditioning hikes, urban walks, hikes to peaks or lakes, alongside rivers upstream and down, in canyons and valleys. Backpacking is a primary offering of several entities that bring groups to local mountains, deserts, the Sierra Nevada, national parks in California and around the country. Trips can have a purpose such as trail maintenance, environmental activism or education, or community support. A few GSCs are allowed to lead mountaineering trips (see Chapters 1 and 3). Training events and the Advanced Mountaineering Program are sponsored by LTC; and the Wilderness Travel Committee sponsors the Wilderness Travel Course.

While most trips are by foot, some are on bikes, some by kayak, on skis or snowshoes. The Chapter also sponsors Travel Adventures - fundraising trips to Alaska, Hawaii and to several US destinations, along with select international trips.

### **Outings Chairs**

The Angeles Chapter outings program depends on rated leaders, eager participants and – just as important -- Outings Chairs (OCs). OCs help their Group, Section or Committee or Task Force (GSC) plan, schedule, review and publish outings. OCs assist leaders in keeping their status current and guide new leaders through the provisional process. They maintain sign-in sheets and are familiar with Club rules, including the Rules of Conduct and safety policies. OCs can also help foster a welcoming environment and set a positive tone for their entity's outings. Periodic review of the LRB, use of the databases are all part of the OCs tasks.



**OCs: See [“For Outings Chairs”](#) tab on the LTC website.**

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## **Conservation**

The Board of Directors adopts policy statements on broad national issues (e.g. energy, climate change, transportation). The board also sets long-range (“decadal”) and two-year national campaign priorities for the period of a Congress. All units of the Sierra Club structure are bound by board-adopted policy, and each level of the structure is bound by the policies adopted by the levels above it. The relevant level handles policy about specific local issues.

The BOD prepares resolutions for public consumption on hot national issues, and makes statements of commendation or condemnation aimed at federal agencies and politicians.

### **Sierra Club Conservation Priorities**

The Sierra Club is involved with hundreds of conservation issues, ranging from the protection of specific areas to policy questions of global scope. The Sierra Club’s various campaigns are conducted locally, regionally, nationally, and internationally. To be effective, though, the Sierra Club must focus its efforts. Accordingly, the Board of Directors periodically adopts national conservation issues for top-priority campaigns.

*Selected Priorities, Campaigns and Initiatives, among many:*



***Beyond Coal . Beyond Gas . Beyond Oil . Clean Energy For All***

### **Angeles Chapter Conservation Policy Formation**

Chapters develop policy applicable to the area they cover and governmental entities contained therein. The Chapter's Regional Groups coordinate policy stances involving issues in their own areas with chapter policy. The Angeles Chapter has specific local concerns that range from preserving regional mountain, desert and wetlands environments to transportation and environmental justice and water issues. Several subcommittees and task forces coordinate regional advocacy efforts such as:



***Ballona Wetlands Restoration . Banning Ranch . San Onofre.  
Climate Change . Environmental Justice. . Water . Montebello Hills and more***

*See Contacts and Resources at the end of this chapter for more.*

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## **Conservation and Outings Leadership**

The national outings program was started when the Sierra Club was less than ten years old. William E. Colby, then secretary of the Sierra Club, led the first wilderness outing in 1901: a high trip into the Sierra Nevada. Sometimes lasting two months and including as many as two hundred participants, this outing became an annual occurrence. John Muir, Colby, and other early leaders of the Sierra Club were motivated to establish and expand this program by their love of the wilderness.

These early - and legendary- camping trips were not just for hiking and feasting. They included naturalists and scientists on board to entertain and inform campers. Over the years, the Club's original goal - the study and protection of natural scenic resources, particularly those of California's mountain regions - expanded to encompass the earth's environment. In addition to studying, protecting, and creating parks for forests, seashores, and rivers, projects focus on such broad national and international issues as biological diversity, public land use, toxic waste, air quality, clean soil and water, various forms and uses of energy, climate change, and economically sustainable development. While the Club no longer conducts such large and invasive camping trips, the Club today is committed to including conservation and educational elements in outings. The Club is also committed to reducing barriers and expanding access for all people to explore and enjoy nature.

Today, some hikers post proof they were "there" on social media. Or they tell their adventures to family and friends. This is all part of spreading the "good tidings" that the Club's founder, John Muir, famously referred to. Sharing photographs of scenic places is one way to spur enthusiasm for protecting the environment, but actually bringing people to these places does much more. Outings are the front line of public engagement with the outdoors and they are a key to integrating appreciation with advocacy.

## Designing a Conservation-Themed Outing

As the leader, you can go even further by doing research ahead of the trip and designing it around a local environmental priority. By learning the key talking points, you can share what you know - without trying to lecture. Not everyone can toss off facts and sound like an authority and not all participants want to listen. Just pointing out a relevant item can go a long way towards capturing your participants' attention during a break. You can even carry a cheat sheet on your mobile device - to tell a story about why a rocky park is named Vasquez (after the bandit), or how the "Bridge to Nowhere" was named. Or invite an authority along to point out geological features, or include a naturalist who knows what plants are native and what are not.

You can create outings that explore how a wetland needs saving, team up with a Conservation entity task force to fashion an outing around a specific local campaign (zero waste) or even a National campaign such as around climate change. Stay informed about local and national issues that affect wilderness areas as well as places close to home. Learn about the places you want to go and eventually become an effective speaker on topics related to these places. A key ingredient of effective leadership is knowledge - and the willingness to share it with others.

### ***A few more ideas:***

- Plan a hike to one of the "Places We've Saved" or similar Club-supported destinations such as the Mojave National Preserve, the San Gabriel National Monument and Santa Monica Mountains National Recreation Area.
- Tell a story about how a local or state park was created, e.g. Kenneth Hahn State Park situated next to oil derricks. Explore the LA River and its recovery process.



***See Chapter 2 section on Environmental Awareness, a requirement for I, M and E.***

## Land Acknowledgements

Every place that we explore, enjoy, and protect—from our national parks to our local green spaces—has not only a natural history, but also a human story. Incorporating a land or "territory" acknowledgement at the beginning of an outing is a way to recognize, center, and pay respect to this history, honor the ongoing relationship between Indigenous peoples and their ancestral territories, and share gratitude for being able to spend time in these places.

*What is a Land Acknowledgement?* While it can take many forms, it is a spoken statement at the beginning of an event or gathering that acknowledges the traditional and ongoing relationship between Indigenous people and the land you're currently on. A brief acknowledgement might simply mention the names of the Indigenous peoples for who these lands are traditional territory. A longer one might share additional history and context, covering Indigenous uses of the land, treaty history, the effects of colonialism, and more.

It is up to you as the hike leader to decide how much you'd like to share during the acknowledgement; the length is less important than the intention and meaning behind it. A land acknowledgement is not meant to be a throwaway mention—or a token—but rather an opportunity to communicate respect, share history, offer education, and provide context for reflection. Local and regional information is available on many websites related to our parks, mountains and deserts.

# Leave No Trace Principles of Outdoor Ethics

## Plan Ahead and Prepare

- Know the regulations and special concerns for the area you'll visit.
- Prepare for extreme weather, hazards, and emergencies.
- Schedule your trip to avoid times of high use.
- Visit in small groups. Split larger parties into groups of 4-6.
- Repackage food to minimize waste.
- Use a map and compass to eliminate the use of marking paint, rock cairns, or flagging.

## Travel and Camp on Durable Surfaces

- Durable surfaces include established trails and campsites, rock, gravel, dry grasses, or snow.
- Protect riparian areas by camping at least 200 feet from lakes and streams.
- Good campsites are found, not made. Altering a site is not necessary.
- In popular areas:
  - Concentrate use on existing trails and campsites.
  - Walk single file in the middle of the trail, even when wet or muddy.
  - Keep campsites small. Focus activity in areas where vegetation is absent.
- In pristine areas:
  - Disperse use to prevent the creation of campsites and trails.
  - Avoid places where impacts are just beginning.

## Dispose of Waste Properly

- Pack it in, pack it out. Inspect your campsite and rest areas for trash or spilled foods. Pack out all trash, leftover food, and litter.
- Deposit solid human waste in catholes dug 6 to 8 inches deep at least 200 feet from water, camp, and trails. Cover and disguise the cathole when finished.
- Pack out toilet paper and hygiene products.
- To wash yourself or your dishes, carry water 200 feet away from streams or lakes and use small amounts of biodegradable soap. Scatter strained dishwater.

## Leave What You Find

- Preserve the past: examine, but do not touch, cultural or historic structures and artifacts.
- Leave rocks, plants and other natural objects as you find them.
- Avoid introducing or transporting non-native species.
- Do not build structures or furniture or dig trenches.

## Minimize Campfire Impacts

- Campfires can cause lasting impacts to the backcountry. Use a lightweight stove for cooking and enjoy a candle lantern for light.
- Where fires are permitted, use established fire rings, fire pans, or mound fires.
- Keep fires small. Only use sticks from the ground that can be broken by hand.
- Burn all wood and coals to ash, put out campfires completely, then scatter cool ashes.

## Respect Wildlife

- Observe wildlife from a distance. Do not follow or approach them.
- Never feed animals. Feeding wildlife damages their health, alters natural behaviors, and exposes them to predators and other dangers.
- Protect wildlife and your food by storing rations and trash securely.
- Control pets at all times, or leave them at home.
- Avoid wildlife during sensitive times: mating, nesting, raising young, or winter.

## Be Considerate of Other Visitors

- Respect other visitors and protect the quality of their experience.
- Be courteous. Yield to other users on the trail.
- Step to the downhill side of the trail when encountering pack stock.
- Take breaks and camp away from trails and other visitors.
- Let nature's sounds prevail. Avoid loud voices and noises

From <http://www.lnt.org/programs/lnt7/index.html>

## Leave No Trace and the Sierra Club

The Sierra Club takes great pride in respecting the wild places of the earth. One way to do this is to minimize our impact on the places where we lead our outings. Leave No Trace (LNT) is a program with a mission to promote and inspire responsible outdoor recreation through education, research, and partnerships. We encourage all leaders to follow and promote the LNT Principles of Outdoor Ethics on every outing they lead. The *LNT Principles of Outdoor Ethics* are copyrighted by National Outdoor Leadership School and Leave No Trace, Inc.

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## Contacts And Resources / Chapter 2

### **Angeles Chapter Office**

3250 Wilshire Blvd. #1106

Los Angeles, CA 90010-

Phone: 213-387-4287

Chapter Website: [angeles.sierraclub.org](http://angeles.sierraclub.org)

LTC Website: [sierraclub.org/angeles/leadership-outings](http://sierraclub.org/angeles/leadership-outings)

LTC Admin email: [ltcangeleschapter@gmail.com](mailto:ltcangeleschapter@gmail.com)

Safety Committee email: [Safecomm@angeles.sierraclub.org](mailto:Safecomm@angeles.sierraclub.org)

### **Sierra Club National Office**

2101 Webster St Suite 1300

Oakland, CA 94612

Main phone: 415-977-5500

Phone for Incident Reporting / emergencies: 1-888-Outings (888-688-4647)

Public Website: [sierraclub.org/home](http://sierraclub.org/home)

Campfire Community site for leaders: [community.sierraclub.org](http://community.sierraclub.org)

**Sierra Club Foundation:** [sierraclubfoundation.org/about-scf/our-values/history](http://sierraclubfoundation.org/about-scf/our-values/history)

*Any links to “Campfire Community” will be easy if you already use Campfire Events as you will have the same login. If you are not yet a leader or not a Club member, you will not have access.*

Sierra Club outings history:

[community.sierraclub.org/section/outings/outings-wide-resources/sierra-club-outings-history](http://community.sierraclub.org/section/outings/outings-wide-resources/sierra-club-outings-history)

Sierra Club conservation and outings links:

- Sierra Club conservation policies: [sierraclub.org/policy](http://sierraclub.org/policy)
- Our Wild America: [community.sierraclub.org/section/campaigns-and-programs/our-wild-america](http://community.sierraclub.org/section/campaigns-and-programs/our-wild-america)
- Sierra Club Campfire Community page on Campaigns: [community.sierraclub.org/section/conservation-programs](http://community.sierraclub.org/section/conservation-programs)
- Sierra Club and LNT: [community.sierraclub.org/page/outings-leave-no-trace](http://community.sierraclub.org/page/outings-leave-no-trace)
- Sierra Club’s Equity Values: [sierraclub.org/equity/faq](http://sierraclub.org/equity/faq)
- National outings: [community.sierraclub.org/section/outings/national-outings/committees](http://community.sierraclub.org/section/outings/national-outings/committees)

## Sierra Club History Resources

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

- From the Vault: [vault.sierraclub.org/history/](http://vault.sierraclub.org/history/)
- 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)

### **Angeles Chapter**

- Chapter Home page: [angeles.sierraclub.org](http://angeles.sierraclub.org)
- Angeles Chapter Activity Sections here: [angeles.sierraclub.org/about\\_us/whats\\_your\\_passion/activity\\_sections\\_committees](http://angeles.sierraclub.org/about_us/whats_your_passion/activity_sections_committees)
- LTC website Home: [sierraclub.org/angeles/leadership-outings](http://sierraclub.org/angeles/leadership-outings)
- Chapter Outings Management on this page: [sierraclub.org/angeles/leadership-outings/management](http://sierraclub.org/angeles/leadership-outings/management)
- Wilderness Travel Course: [wildernesstravelcourse.org](http://wildernesstravelcourse.org)

### **Other References**

About Land Acknowledgements with links: [native-land.ca/territory-acknowledgement/](http://native-land.ca/territory-acknowledgement/)

Leave No Trace: [lnt.org](http://lnt.org)



Onward to Chapter three





# 3

## Outings Oversight and Policies

### The Angeles Chapter Safety Committee

Safety is everyone's job. Angeles Chapter volunteers lead thousands of trips each year for many thousands of participants with remarkably few injuries. That's a tribute to the culture of safety that shapes leadership training and our outings program. Our volunteers lead, and our members enjoy, an extraordinarily broad outings program -- everything from beach walks to technical mountaineering -- because of that culture of safety.

#### Background and History

In 1970, a voluntary leadership training program was established. At that time, outings were not classified as to their technical nature, nor were the leaders certified. In 1974, the Angeles Chapter decided that an outings safety policy should be established. The policy created a Safety Committee and a system of outings classifications and leader certifications. To provide opportunities for new leaders to obtain training and leader certification, the Leadership Training Program (LTP) also was established. The Safety Committee and the Leadership Training Committee (LTC) work together to ensure that outings are led by qualified leaders.

The LTP can prepare potential leaders in various technical aspects related to the outings. Because the most important aspect of leading outings is leadership, provisional outings give new leaders an opportunity to exhibit leadership. Final recommendation by the Safety Committee is required to complete the LTP and become a certified outings leader.

#### Safety Committee Responsibilities

**Approves procedures** for Groups, Sections, and Committees (GSCs). A few of the GSCs sponsoring outings higher than O have a safety policy that expands on and supports the chapter policy. Those GSC policies contain specific training and procedural requirements for leaders of outings sponsored by that group. New leaders should obtain a copy of these procedures from GSCs for which they plan to lead and become familiar with the specific requirements of those entities.

**Certifies leaders.** Completion of LTP requirements is the usual method of obtaining certification. Special requests based on LTP requirement equivalency may be considered. Certification is at the minimum level, and leaders are encouraged to advance their experience and training actively. After successful completion of the committee review, a certification card and leader patch are mailed to the leader.

**Publishes a yearly safety report.** The report is emailed to the chair and outings chair of all GSCs. The report contains the current chapter safety policy. GSC outings chairs are responsible for ensuring that leaders are qualified to lead outings sponsored by that GSC.

**Investigates accidents and complaints.** To reduce the frequency of accidents, actions are taken as appropriate. The committee receives and reviews written complaints concerning leader conduct and takes appropriate action, which can include a permanent revocation of leader certification.

**Monitors publications.** The Safety Committee monitors listings in the online Chapter Schedule of Activities, in GSC newsletters and on their web sites that contain scheduled outings. The Safety Chair and Outings Reviewer(s) receive copies of newsletters and submit appropriate comments to the sponsoring groups. The Safety Committee evaluates the trips for these aspects:

- 1) Reasonableness of the trip,
- 2) Proper classification of the trip,
- 3) Listing of two appropriately rated and current leaders.

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## Trip Classifications

The Safety Policy, included at the end of this chapter, provides a brief description of the classifications of outing difficulty. These classifications help to ensure that participants and leaders have a common understanding of the difficulties involved in the outing. By working with an experienced outings chair, a leader can be sure to classify outings properly. Some additional comments to elaborate on the descriptions in the Safety Policy are included below.

**The O-rated category** covers a variety of outings (e.g., beach walks, bike rides, climb of Mt. Lowe). Trips at this level can include easy cross-country if they do not require the use of navigation skills and are still class 1 (walking, not class 2, which is going over rougher terrain where hands may be occasionally used for balance). For example, a hike on a trail comes within a short distance of the summit of a peak. The peak can be seen from the trail, and no navigation or scrambling is necessary to hike from the trail to the summit and return. O-level overnight backpacks may be led by O-2 rated leaders. O-1 leaders may lead day outings.

**Snowshoe and cross-country ski trips** are restricted to leaders rated at the I-level or higher unless the Safety Chair grants a one-trip waiver for one or more of the leaders to be O-rated. Waivers typically will be granted only if the O-rated leaders have demonstrated experience and if the route is suitable. Trips granted under this waiver must be cancelled if a heavy snowfall is forecast. This restriction also applies to trips where the leader requires the use of microspikes.

### I Rated Trips

“I” outings involve cross-country travel. The term Class 2 would apply to I-level trips. Hands can be used for balance on an I trip, but if they must be used for climbing, the trip must be rated higher than I. Because of the navigation usually required, snowshoe or cross-country ski trips normally require two I-rated leaders; the Safety Committee may grant a waiver for some exceptions.

Leaders of I-rated trips must avoid crossing the boundary from 2nd class into 3rd class terrain. On snowshoe or cross-country ski trips, this means being aware of snow conditions and avoiding hard snow that would require the use of an ice axe. On rock, this means avoiding steep terrain where hands are required for climbing and not merely for balance. When in doubt, turn around and find a safe way down.

## M Rated trips

Rock climbing at the M level will involve the use of hands, and some participants may want a belay for safety. The term Class 3 would apply to M-level trips. Snow-climbing at the M level will require the use of ice axes; crampons may also be used.

An M-rated rock outing would involve class 3 scrambling or climbing over rock. Class 3 climbing is defined as that in which hands are used frequently for upward progress. A top rope belay may be used on M rock routes. Exposure for M-rated snow or rock routes would be classified as moderate.

An M-rated snow climb would typically take place on slopes that in late summer would be class 1 or 2 sand, scree, or talus slopes. The snow on these slopes would be less than the angle of repose of scree, that is, less than 34 degrees. An occasional short section of soft snow up to 45 degrees may be encountered. Ice axe skills for snow climbing, self-belay, and self-arrest are mandatory for these snow climbs.

On M-rated snow climbs, the snow should have a consistency that allows for step kicking. Crampons may be used on a M-rated snow climb to facilitate an early morning start or more rapid movement on consolidated snow. Crampons, however, should not be necessary for climbing (step kicking is possible, but slower due to surface hardness), but may be required by the trip leader. An occasional top rope belay may be used to get the group past a short exposed or icy spot.

## E Rated trips

Rock climbing at the E level will involve the use of a rope. The term Class 4 would apply to E-level trips. Snow climbing at the E level requires the use of crampons as well as ice axe.

An E-rated rock climb may involve travel on belayed class 4 pitches. Climbing proficiency, belaying, knots, and rappel skills may be necessary. Exposure for E-rated routes is likely to be significant, and belay, anchoring, and/or self-belay skills must be adequate to provide a margin of safety for all participants.

An E-rated snow climb extends conditions to steeper slopes and harder snow where crampons are mandatory. Roped snow travel, belays, and glacier travel with crevasse hazard may occur. Skills for these conditions including crevasse rescue techniques may be required, depending on the trip.

Class 5 rock climbs and vertical ice climbing are beyond the scope of the E rating, although a 5<sup>th</sup> class summit block is within the scope of the E. This difficulty of outing is classified as T (technical). Mountaineering outings at this level are not currently sponsored by the Angeles Chapter.



*Many M and all E outings are designated as MR and ER in the trip listing. The R indicates that the outing is restricted to Sierra Club members only, a requirement of the Club's insurance. Any trip on which an ice axe or a rope may be used is a restricted mountaineering outing.*

## T-rated Trips

A few outings are designated by the T rating, which indicates that special technical skills, such as sailing or ski mountaineering, are required.

## Conditions That Can Change the Classification

Circumstances can change the classification. Spring trips may involve travel where trails are obscured by snow. Although streams do not have a classification, crossings in April and May could justify an E trip rating, while in summer the crossing could be made in ankle deep water. Rain and snow—even a small amount—can change rock travel from easy to hazardous. Fog or darkness can quickly present a severe navigation challenge to an O-rated leader. Being prepared as a leader means having skills that normally would exceed the demands expected for the planned outing.



*See more about conducting outings and leadership qualities and styles in Chapter 4.*

Leader judgment is necessary in assessing current conditions of any route based on the weather and other factors. Many routes require excellent route-finding to stay on terrain of the guidebook-listed difficulty. Straying “off- route” can suddenly put the group on significantly more difficult ground than that anticipated. Any route can also quickly become much more difficult with a change in conditions. Knowing the skills of the group as well as those of the leaders is essential in judging whether a route is safely within the described limits of the outing as well as within the skill limits of the participants.



*Leaders must not exceed the listed outing rating and always maintain a safety margin. See Chapter 4 on Leadership and Safety Management, including section on Hazards.*

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## About Forms

Forms for outings include waivers, both individual and group “sign-in sheets,” minor release forms, provisional evaluations, emergency / patient forms and more. The forms for Incident Reports and combination sign- in/waiver sheets are accessed on the LTC website. See Resources later in this chapter.

Mountaineering outings and watercraft outings falling under the “restricted outings” category require special forms. All these forms are issued by the National Sierra Club. Mountaineering outings have specific sign-in/waiver forms that have a space for the member numbers for each participant . These are found on the LTC site under “Forms” and under Advanced Ratings.

### Incident Reporting

An Incident Report must be filed whenever an accident or incident occurs on a Sierra Club sponsored activity. Use the approved form on the LTC web site or as advised by the Safety Committee.



*The Angeles Chapter uses a customized Incident Report form that is different from the standardized National form.*

The approved Chapter instructions ask for reports on incidents that are not deemed life-changing for the patient and may even seem minor (altitude sickness, a recurring injury, disruptive behavior and similar).

***Incident Reporting information and Forms are found on the LTC website here:***  
<https://www.sierraclub.org/angeles/leadership-outings/incident-reporting>

Make the report as soon as possible after the event even if it is unlikely that the Sierra Club may have a liability for the incident. In the event of a serious injury or fatality, the national Sierra Club office must be informed immediately. The toll-free emergency number for such reports is 1-888-OUTINGS (1-888-688-4647) (International-303-281-9914)

If after business hours, you will be directed to “PRESS 6” for an emergency. You will be transferred directly to our answering service and the operators will know this is a Sierra Club emergency. They will take down vital information and transfer you to one of the available Program Safety staff who will assist in managing your emergency.



**We like to say, “When in doubt, fill it out.”**

***Sierra Club Incidents***

- A fatality.
- Any incident that requires search, rescue or evacuation.
- Any injury that requires advanced first aid.
- Any injury or illness that could have future complications or require medical attention after the outing (i.e. animal bite, severe sprain).
- Any act of suspected sexual harassment or child abuse.
- Any act that violates the law.
- Any act that results in property damage that could result in a claim.

***Angeles Chapter Incidents***

- Additional Angeles Chapter-only requirements: Any other incident that compromises the outing's objective for all or some participants, including:
  - lost person(s)
  - altitude sickness or heat illness
  - a problem participant
  - recurrence of a prior condition.

Leaders should carry a copy of the form on the hike. Memories fade rapidly, particularly under stressful conditions. Note that it is preferable to submit reports for seemingly minor events than not to report them at all. What seems to be a simple illness or a sprain could turn out to be a stroke or a fracture when the person visits a doctor after the outing. A participant who has a scrape or minor scratches may also suffer an emotional response that can grow during and after the trip, resulting in a complaint. It is also worthwhile to document an incident in which a participant makes other participants uncomfortable or disobeys a leader.

## Emergency Response–Patient Report

In the event of an emergency that requires outside help, the Emergency Response-Patient Report Form should be used. Each of the two leaders should carry a copy on the outing, with one copy being retained at the emergency site. The copies should contain identical information so that there is no need to question what information the messenger took to the rescue party. This form is available on the Forms page. See Chapter 4 on Hazards and Evacuations

## Liability Release / Sign-in / Waiver

The national outings and risk management office of the Sierra Club issues the authorized version of the sign-in sheets and waivers that we use, including procedures that we follow. Some Chapter entities have different procedures that have been sanctioned by Program Safety and our Safety Committee. For all outings, a “sign-in / waiver” must be signed by each participant. Minors on outings require extra attention and parental signature. See the Forms page on the LTC site for more detail on waivers, minors and more.

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## Rules Of Conduct

The Rules of Conduct give the outings leaders the authority to conduct the outings and manage the group. Many GSCs have special modified versions incorporated into their outings procedures. Outing leaders should check with the outings chair of the sponsoring GSC to obtain a copy of these procedures and rules that apply to that entity’s outings.

Although cell phones and other devices may be used to summon help in some circumstances, leaders should note that reception is not possible in many outings locations. Although carrying a cell phone is advised, the cell phone is not a substitute for the safe conduct of the outing, nor for the leader’s ability to manage an emergency.

### THE ANGELES CHAPTER OUTINGS RULES OF CONDUCT

The following rules apply to all persons participating in outings activities of the Angeles Chapter of the Sierra Club. Violation of these rules may result in removal of a participant from a particular outing and/or revocation of the privilege to participate in future outings.

- ❖ **Authority of the Leader:** The authority of an outing leader is nearly absolute. The outing leader is the sole judge of the qualifications of participants. Participants must comply with the orders and instructions of the outing leader.
- ❖ **Leave No Trace:** The Sierra Club supports leave no trace principles, including minimizing the environmental impact of travel and camping, disposing of waste properly or packing it out, leaving natural objects as you find them, using stoves for cooking, limiting campfires to a single small campfire where permitted, respecting wildlife, storing food and garbage securely and being courteous to other visitors.

- ❖ **Compliance with Laws and Regulations:** Sierra Club outings are conducted in compliance with applicable laws and regulations, including requirements for entry permits, campfire restrictions, campsite location restrictions, waste handling rules, parking restrictions, etc. Rangers and other law enforcement personnel are to be treated with respect.
- ❖ **Sexual Harassment:** Sexual harassment of Club members, volunteers or others who participate in Club-sponsored activities is prohibited. Sexual harassment includes unwelcome sexual suggestions, physical contact, offensive sexual language or images, or use of club contact information to make unwelcome sexual suggestions outside of Club activities.
- ❖ **Animals:** Animals (other than guide dogs) are prohibited unless a specific announcement that animals are allowed is included in the trip write-up. The leader may permit a disabled participant to bring a guide dog as long as the group safety isn't jeopardized or local land agency rules or regulations are not violated.
- ❖ **Firearms:** Always prohibited.
- ❖ **Cell Phones:** Both leaders and participants are encouraged (but not required) to carry cell phones because they may be a useful resource in an emergency. Inappropriate or excessive use of cell phones for non-emergency communications can be annoying to participants.
- ❖ **Eligibility to Participate:** Most Angeles Chapter outings are open to both Sierra Club members and non-members. Eligibility restrictions, if any, should be stated in the trip write-up. Sponsoring entity themes should be regarded as a clue to the ambiance to be expected rather than a restriction on participation. For example, you don't have to live in the San Fernando Valley to go on an outing sponsored by the San Fernando Valley Group and you don't have to be single to go on an outing sponsored by the Sierra Singles Section.
- ❖ **Qualification to Participate:** Trip announcements typically give information about the physical challenge involved (distance and elevation gain) and the skills, equipment and experience required for successful participation. Some trips require prospective participants to provide information about their conditioning and experience to the leader for screening in advance of the trip. Other trips may simply ask participants to screen themselves before showing up at the trailhead. In either case, you should be honest with the leader or yourself. If you participate in a trip for which you are really not qualified, you won't enjoy the experience and you may make the experience less enjoyable for other participants. Leaders should give good faith consideration to accommodations requested by potential participants who are disabled.
- ❖ **Minors:** Participants under 18 years of age must be accompanied by a parent or guardian or have written permission from same giving phone number and authorization for continuing treatment by a physician in case of necessity. An Authorization and Consent form can be found [here](#).
- ❖ **Liability Waiver:** All participants are required to sign a liability waiver. This is an important legal document which limits your right to sue the Club or its leaders in the event of injury on an outing. Your participation in an outing is a voluntary recreational activity. If you are not willing to sign a waiver, you need to find some other recreational activity.
- ❖ **Travel Procedures:** Participants are to remain with the group unless the leader gives

permission to leave, adhere to routes designated by the leader, refrain from "short cutting" switchbacks on trails, and remain behind the leader and ahead of the trail sweep.

- ❖ Outing leaders therefore have the authority to restrict or regulate the use of cell phones.
- ❖ **Hand-held Transceivers:** May be carried but used only if permitted by the leader and subject to further leader restrictions.
- ❖ **Radios and Sound Listening Devices:** May always be used at camp if equipped with earphones for private listening. On the trail or when climbing, use may be restricted or prohibited by the leader in the interest of safety.
- ❖ **GPS Receivers:** Generally permitted, with the sole exception of navigation checkouts, where evaluators may prohibit use or possession in order to test a candidate's skill at non-electronic navigation techniques.
- ❖ **Hiking Poles:** Permitted unless the trip announcement indicates that hiking poles are not permitted. Even when permitted, leaders have the authority to require safe practices in use of hiking poles and restrict their use when appropriate for safety reasons.
- ❖ **Bike Helmets:** Participants and leaders must wear appropriate safety helmets while riding on a bicycle outing.
- ❖ **Technical Climbing Gear:** In general, gear such as ropes, ice axes, or crampons is appropriate only on approved Restricted Mountaineering Trips. There is no prohibition against outings participants bringing along whatever mountaineering or safety equipment they may choose to bring on an outing for their own personal safety. However, the use of technical climbing gear should be restricted to avoiding unanticipated hazards only, not to be used for mountaineering that is not part of the structured outing.

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## Harassment

The policy of the Angeles Chapter Sierra Club is that there is no place in Sierra Club events or outings for harassment, sexual or otherwise, of leaders or participants. Such action by any Sierra Club leader or participant will not be tolerated, and violation of the policy will result in disciplinary action, including loss of leadership status and loss of privilege of participating in Sierra Club events or outings.

Harassment may take many forms, including:

- Verbal conduct--such as swearing; epithets; derogatory comments; or racial, ethnic, or gender-based slurs--or unwanted sexual advances, invitations, or comments
- Physical conduct such as assault, pushing, or blocking normal movement
- Retaliation for having reported harassment.
- Specific forms of sexual harassment include
  - Pressure for sexual favors
  - Demands or requests for sexual favors accompanied by threats concerning acquisition
  - of volunteer leadership roles or overt promises of preferential treatment
  - Repeated requests for dates or "get-togethers" when a person has said "no"
  - Unwanted physical contact such as touching, pinching, or brushing against



- Persistent unwanted attention to physical appearance or manner of dress
- Inappropriate sexually-oriented questions about a person’s personal life
- Intimidation, hostility, or condescension based on gender
- Obscene remarks, jokes, insults, or tricks
- The use of stereotypes based on gender in attempts at humor.

Although harassment is not common, it happens, unfortunately, that people on outings sometime feel “preyed upon,” “targeted,” or seen as “fair game” by others. This is more likely the case for single, unaccompanied people. Leaders should be alert for such inappropriate conduct and sensitive to the need to make everyone feel welcome and comfortable.

For leaders themselves to be guilty of unwanted sexual advances is particularly unacceptable. Several avenues are available to a person who feels that they are a victim of harassment, sexual or otherwise. They include:

- contacting the chair or the outings chair of the GSC sponsoring the event or outing;
- the chair of the Outings Management Committee;
- the Conflict Resolution Committee
- the chair of the Chapter Executive (ExCom) Committee;
- the Local Outings Manager at Sierra Club Headquarters in Oakland.

## Complaints

Leader candidates, rated leaders, and outings participants may choose to voice questions, concerns, or complaints pertaining to outings and outings leaders. In such circumstances, several alternatives exist.

- If the complaint arises because of a technical checkoff (navigation, rock, or snow), the complaint should be made to the appropriate technical chair or chair of the LTC.
- If the complaint arises on non-training outings, it should be addressed to the chair of the Angeles Chapter Safety Committee if it is an issue related to the safe conduct of outings.
- If safety is not the primary issue, then the complaint should be addressed to the ombudsperson/member advocate of the Angeles Chapter Outings Management Committee. The Chapter also has a Conflict Resolution Committee charged with handling and investigating concerns related to behavior, harassment and bullying. [ombudsman@angeles.sierraclub.org](mailto:ombudsman@angeles.sierraclub.org)

The LTC page on Rules of Conduct includes links to the latest Sierra Club Standards of Conduct as well as other resources that are useful for gaining insight into what to do, what is tolerated, what you can do in the moment, or later with your entity and Chapter Conflict Resolution.

[sierraclub.org/angeles/leadership-outings/rules-conduct](http://sierraclub.org/angeles/leadership-outings/rules-conduct)

## Handling Complaints and Behaviors

The rare disputes, issues and problems that crop up during outings or meetings can get away from us. Keep these two concepts in mind: **prompt intervention** and **appropriate action**. Don't let things slide. You will only make a bad situation worse. Even the smallest dispute or disruptive behavior can easily get out of hand. Respond in a manner in keeping with the situation, with the least amount of drama.

An escalated behavior issue can require more care, more time and documentation. It may involve a leader or participant who is strongly resistant to feedback, or unwilling to learn and change. Very rarely it can involve a violation of the Sierra Club's [Standards of Conduct](#), or even formal misconduct - like sexual harassment or financial impropriety. Sometimes it can also take the form of a complaint or series of complaints from others about the behavior of a specific participant.

### **Here are some key steps**

**Define the Problem:** is it a participant who is unhappy with the way a trip went? an objection to a route? or a refund problem? or is it behavior? not following the leader? We occasionally see violations of the Rules of Conduct, especially item # 1 - Authority of the Leader, as in when a participant doesn't want to go along with the plan, is confrontational or actively causes other participants to feel uncomfortable.

#### ***During an Outing: Immediate Handling***

It is important to immediately address a problem behavior with the participant. Addressing problem behaviors can de-escalate conflicts by focusing on behaviors that can realistically be modified. Diplomacy and peer pressure are effective tools for resolving these types of issues. Either way, be kind but firm in stating the problem and what needs to change in order for the outing to continue. Be clear about these expectations. Pull the participant aside and speak to them in private, or ask someone on the outing who has befriended the person to talk to them. When speaking with the participant, do the following:

- Acknowledge and tend to their concerns.
- Explain and discuss that the person's behavior has an impact on the group, that the behavior needs to change, and that there will be reasonable, specific consequences if the behavior is not changed.
- Bring the participant back into the group with a sense of purpose and belonging (give the participant a task).

A private low-key conversation is preferable to calling someone out during the event. A disruptive person may be highly emotional and you may become caught up in an escalating situation. A calm helpful tone can help diffuse these situations, as can carrying the Rules of Conduct with you (paper or on mobile).. You can also follow-up after the trip to discuss further. This same kind of handling can apply to meetings or other interactions.

**Assess and Investigate.** This applies to situations that cannot be resolved in the moment.

- Gather facts about the events, the individuals involved, witnesses, dates, and preserve emails and communication for your reference, or for a potential incident report, your GSC outing chair and/or chair, or Chapter ombudspersons and Conflict Resolution Team later if necessary.
- If the complaint involves discrimination, sexual harassment, harassment or bullying, seek help promptly from a senior leader (GSC Chair, OMC Chair, the Chapter,. See below under "Address the issue."

**Informal person-to-person resolution.** If the problem could not be fully addressed during the outing, find time to talk to the person after - ideally as soon as possible.

**Reporting Complaints.** Leaders can gain support after the trip by sharing what happened with their outings chair and/or entity chair or mentor. If you are unsure whether the occurrence requires formal "incident" reporting, LTC can provide advice, as can the Safety Chair or the chapter ombudspersons.

**Addressing the Issue.** During a trip, you may not be able to resolve differences on the spot. You may need to ask a participant to sign out and leave a trip, as long as it is safe to do so. After a trip, your differences may be too great and tempers may need to cool off before you can address the issue further. This is when consultation with your entity, OMC Chair and/or chapter ombudsperson or conflict resolution team may be useful, especially in determining whether the complaint needs to be shared with the Chapter or National.



*See also Chapter 4 for information on leadership styles. And see below on Signing Out.*

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## Signing Out: The Rules

The Rules of Conduct and the Chapter Safety Policy require that the group be kept together at all times. Generally, no one is to get ahead of the leader or behind the sweep. Participants are not to leave the group unless signed out by the leaders when, in the leaders' judgment, it is a safe and prudent thing to allow this. These rules allow for some leader flexibility and require sound leadership decision making to apply them to the circumstances of the outing. However, uncontrolled joining and leaving a group should not be allowed.

1. The first premise of our outings policy is that all of the participants and leaders will start the outing together, stay together throughout the outing, and return to the end together. If a participant is not willing or able to participate on the terms of the outing proposed in the write-up, he or she should not be a participant on that outing. Participants who wish to hike faster than the planned pace should seek another outing. If a participant wishes to split off from the group to climb a peak not part of the trip objectives, he or she should not sign up to participate on the group outing.
2. While some situations may require the leader to allow a participant to sign out of the group, this should be the exception and should be done only when it is safe. If the group is at the cars or a short distance away where a safe return is assured, signing out someone is fine. Other options are returning the entire group to the cars to ensure a sick or tired participant gets out safely or sending back several qualified people with the person signing out early.

3. On rare occasions a participant may be creating a problem for the group or other participants. Signing out the problem person may be done only when safe, but it may be necessary to ensure the enjoyment of the entire group. The leader may have to cancel an outing by returning the group to the cars to deal with a problem person if it is not safe to sign them out on the spot.
4. Splitting the group creates two outings, each of which must have two leaders qualified at the level of the outing.
5. Signing out a participant to go home or to split off to another objective can have two very negative results. First, it weakens the remaining group in the event of an emergency through its decrease in numbers. Second, the person signing out may lead others to come along, who are trusting the person splitting off to be a safe and competent “leader” (and in fact the first one leaving may not be qualified to be a leader either formally or not). If an accident occurs, this kind of situation could have very disastrous results if an accident occurs for both the entrusted one and the Club.
6. If leaders are having problems with participants who wish to sign out and do their own thing, those participants should not be allowed to participate on future outings unless they agree to abide by the outing plan and leaders’ directions. Signing out is not “fine” and should be discouraged.
7. Some outings have clear break points such as a multi-day trip car camp trip. With the leader’s permission, it is possible for participants to arrive a day late, or leave early. This is different from signing out someone in the middle of a hike.
8. A good practice is to include date and time of sign out.

### Signing Out A Problem Participant

Signing out a participant before the conclusion of an outing may be appropriate for the safety, comfort, or convenience of that participant or to deal with inappropriate behavior. Most often signing out occurs when someone is significantly slower than the rest of the group. Signing out a participant is a judgment decision, which should not be made lightly, and alternative solutions (modifying trip objectives or turning the entire group around) should always be weighed in the light of the following considerations:

- The group objectives and the length and difficulty of the return route
- Prevailing weather conditions and any other special hazards
- The physical and mental condition of the person to be signed out
- The experience, ability, and equipment of the person to be signed out
- The availability of sufficient personnel to provide an escort if needed
- The level of confidence that the person to be signed out expresses in his or her ability to return safely to the trailhead.



Weighing all the factors, the leader bases the final decision on safety considerations above all else. At the end of the trip, you should file an incident report describing the circumstances, any witness, with as much detail as possible. Documenting a person’s behavior can remain among the leader and the outings chair / entity chair to ensure confidentiality; however, the incident report form does ask that problem participants be documented in an incident report that may go to the Safety investigator as well. **People leaving the group must sign out.**

## **Introduction from August 2018**

The Sierra Club maintains a variety of insurance policies that cover the scope and breadth of activities, outings, and events conducted, and operate within the boundaries of that coverage. The included General Liability coverage helps to protect against losses and acts that are unusual, unintentional, and catastrophic. Leaders acting reasonably within their roles and training and within Club policies are included within this coverage and the protection it affords. Sierra Club and its entities (except the Sierra Club of Canada) operate under the same insurance policies. General liability insurance is purchased to protect against losses from acts that are unusual, unintentional, and catastrophic. Sierra Club insurance does not protect an individual against actions that violate Club policies or when driving a vehicle.

*See end of this chapter for resources and links.*

## **About the Insurance Policy (2012)**

Sierra Club insurance is renewed annually, and significant changes can and do occur. National Sierra Club staff prepare a guide to the insurance coverage to help leaders and outings chairs understand the insurance coverage. The guide is called “Risk Management and Insurance Manual.”

Unfortunately, the insurance policy tends to change faster than the guide can be amended. In case of a conflict, the insurance policy, not the guide, controls. Questions about insurance coverage may be addressed first to the Chapter office and/or OMC Chair. The Local Outings Manager or Safety and risk management office at national Sierra Club can also help local chapter entities with insurance questions.

The basic purpose of the Sierra Club’s insurance is to provide that Sierra Club activities and property are adequately covered by insurance to protect the Sierra Club against significant risk or loss.

## **Comprehensive General Liability**

### ***Coverage–Domestic***

The domestic liability policy provides coverage for the Sierra Club and the Sierra Club Foundation, its employees, and members authorized to act on its behalf against claims for bodily injury, death, damage to property of others, or infringement on others’ personal and property rights. The policy extends to activities of the Sierra Club in the United States and Canada (except for Sierra Club Canada, including the Canadian Chapters/Groups, which is incorporated under Canadian law).

The General Liability policy is not a medical or accident policy to insure covered parties against medical expense or income loss[es] from injuries. It insures the Club, its employees, and volunteers against liability to third parties for unintentional negligence and provides a defense against such claims. For insurance coverage to apply, the following conditions must be met.

1. The person must be an employee, authorized agent, or volunteer of the Club and be acting within the scope of his/her authorized duties. Volunteers must be acting on behalf of the Club in a responsible manner and in a defined role (e.g., outings leader, chairperson, newsletter editor, coordinator for a fundraising event, etc.) and are covered only while performing his/her

authorized function. This is limited by the restrictions on coverage while operating a vehicle as set forth in Auto Liability Coverage. Individual members participating on an outing, or attending a Club meeting, fundraising event, or other activity, are generally not insured by our various policies, since they are not officially acting on behalf of the Club.

2. The “event” or “activity” must be a Club function that has been officially authorized or sponsored by the Club or one of its entities. Typical functions include outings, fundraising activities, volunteer meetings, retreats, etc. Such functions, after being authorized, should be announced in a Club, Chapter or Group publication. Authorization must come from some governing body within the Club, such as a Chapter or Group ExCom, Outings Chair or a Club committee. Individual trips, events or activities, even though participated in entirely or partially by Club members, are not covered if they are privately organized by individuals and not officially authorized by the Club as described above. If an event cannot be announced in Sierra Club publications (i.e., event or outing is planned after a newsletter goes to print), other documentation, such as trip reports, master outing calendar entries, or meeting minutes, must be used to substantiate the activity as an authorized Club event. Chapter, Group, or Outings Chairs must keep the documentation on file for at least as long as the statute of limitation for negligence lawsuits in their state, which can be up to six years from the date of injury (depends on state law).

### **Restrictions in the Domestic General Liability Policy**

Most activities will normally be covered by this policy. Specific exclusions, however, have limited the types of activities the Sierra Club can be involved in, and some activities have exclusions or limitations or require special approval prior to the outing or event. The current restrictions for 2012 are described below, but are subject to change annually. Besides the restrictions on watercraft and mountaineering activities, Challenge Courses, also called Ropes Courses, have restrictions but are not offered by the Angeles Chapter.

#### **Mountaineering Activities**

Any Club event that is expected to use ropes, runners, ice axes, crampons, or other mountaineering equipment is considered “mountaineering” and must be approved by the Mountaineering Oversight Committee (MOC), a group of volunteers with expertise in mountaineering.

This applies only to outings on which mountaineering equipment is expected to be used. In no event should this policy be treated as restricting leaders from taking along such mountaineering or other safety equipment as may be prudent to deal with unanticipated hazards. Leaders must not attempt to avoid the extra requirements for approval of a mountaineering outing if the leaders know or reasonably believe that mountaineering hardware will be required in order to negotiate the planned itinerary or any optional routes on the outing safely.

For any mountaineering outing, an application must be submitted to the MOC Chair [the outings chair does this submission for a leader], who will forward approved applications to Program Safety. The leader cannot make any arrangements or commitments or advertise the outing until the activity has been approved by the MOC.



*See Chapter 1 section on M & E outings and provisionals. See also Screening Participants in Chapter 4: Leadership.*

Due to insurance restrictions, if a professional concessionaire is hired to guide the outing, the following criteria must be met: the concessionaire must have proof of up-to-date American Mountain Guide Certification and the concessionaire must carry liability insurance of at least \$1,000,000 and provide the Sierra Club with a certificate of insurance naming the Sierra Club as additional insured. In the event that a concessionaire refuses to name the Sierra Club as an additional insured, contact the Local Outings Manager immediately.

On all Sierra Club mountaineering outings, the outings leader must have all participants sign an Acknowledgment of Participant Responsibility, Express Assumption of Risk, and Release of Liability waiver form before the trip begins, along with the medical form.



*Angeles Chapter leaders: work with your outings chair to ensure proper documents are prepared. See also Chapters 1 and 4.*

Ice axes and other personal safety equipment may be brought by participants on non-restricted trips. This must not be interpreted, however, to mean that trips may be scheduled on which it is “understood” but “not required” that everyone bring an ice axe, or that belays will be given, but “not required” to avoid the Restricted Outing approval process. Leaders need to live by both the spirit and letter of these regulations. The trip leader needs to judge well in advance whether ice axes or ropes are prudently required for the trip to be led safely. If the leader is not really sure that the trip can be led safely without ice axes or ropes, the leader should make the outing a restricted one and obtain the necessary approvals.

If a trip is not scheduled as a restricted outing and the leader determines during the trip that a rope or ice axes must be used to continue, the trip objective should be aborted, and another goal which can be met safely without using this equipment substituted. If, for example, conditions make it appear that a peak climb may require a rope for some participants to descend safely (even if they could climb up without one), the leaders must abort the climb so that there is no need to use the rope for the descent in a situation that could have been avoided. TRIP LEADERS WHO VIOLATE THIS RULE AND ALLOW THE USE OF ROPES OR ICE AXES WHEN NOT APPROVED RISK LOSING THEIR LEADERSHIP PRIVILEGES AS WELL AS BEING HELD PERSONALLY LIABLE. This policy is not to be interpreted to rule out the use of any safety equipment in an emergency.

Mountaineering Outings are allowed by the Club when they are approved in advance by the national Mountaineering Oversight Committee (MOC) and by Program Safety. Approval of the trip must be obtained prior to publication of the trip in Campfire or an activity calendar of the GSC. These outings are restricted to Sierra Club members only.

At this time the Desert Peaks Section, Leadership Training Committee, Sierra Peaks Section, Ski Mountaineers Section, and Wilderness Training Committee have received approval to lead these “restricted” outings as Angeles Chapter entities. The outings chairs for these sections will have the latest applications for trip certification, special sign-in/waiver sheets, and liability release forms.



*The forms are also located on the Chapter's LTC website. See also Chapter 1.*

Leaders planning on leading a mountaineering outing should contact the appropriate outings chair for the latest information. Only those trips reviewed and approved by the national Sierra Club's MOC will be covered by the Club's liability insurance.

Mountaineering and rock climbing outings as well as mountaineering training outings have the following requirements in common:

1. The leader must obtain approval for the outing prior to publication in Campfire or a GSC activities calendar. Obtain the application forms from the outings chair or LTC web site. Upon approval by the sponsoring GSC, the outings chair will forward the application package to the chair of the Mountaineering Oversight Committee (MOC), who will forward the application to National Program Safety for final approval, which may take up to four weeks to obtain.
  - a. **See also Chapter 1 for a flow chart.**
2. All participants and leaders must be current Sierra Club members and must be screened for appropriate skills suitable for the mountaineering activities planned or those that could reasonably be expected.
3. When the leader sends back trip information to the participants, they should be warned that there is no medical coverage for this type of event and that a liability release form (waiver) must be signed. The leader may enclose a copy of the waiver form for their prior review.
4. All participants and leaders must sign the appropriate Mountaineering Sign-In Sheet Liability Waiver form, which has a space for each person's Sierra Club number.
5. All leaders and participants must provide a completed Participant Medical Form.
6. Leaders may use these for further screening of participants as well as in an emergency.
7. After the trip, the sign-in/waiver and medical forms must be sent to the sponsoring entity's outings chair. (Outings Chair instructions are separate and are subject to notices from LTC and the Safety Committee.)

Mountaineering outings may have as a part of the on-trip climb preparation a skills refresher to make sure that all participants are, for example, current on ice axe arrests. Critique and comments can be made, but all participants should have been pre-screened to make sure that they had the prerequisite skills prior to the outing. A skills refresher conducted as part of a "regular" mountaineering outing should not be used as a training session. And, climbing gyms trips are not allowed as Sierra Club trips.

### ***Mountaineering Training Outings***

Mountaineering Training Trips (including leader certification training) may be led, but training of "rank beginners" is not permitted. This is the only restriction, however, in the material that may be taught. These trips will have as their primary goal training. Trips with limited skills refreshers as a part of a climbing trip (as described above) will not be considered training trips. As with all restricted outings, leaders and participants must be club members, and the trip must be approved in advance (see above). The application for training trips should be used.

### ***Certificate of Insurance***

When arranging an outing or an event, a leader may be asked to provide a "Certificate of Insurance" by a property owner. If this is the case, the leader may consult with the Outings Management Committee



Chair or the Chapter on how to do this. For those familiar with “Clubhouse,” access to certs has moved to Campfire Community. Outings Chairs may do the same and/or contact the Local Outings Manager in Oakland to obtain the proper help. OMC CHair: [omc@angeles.sierraclub.org](mailto:omc@angeles.sierraclub.org)

### ***What to Do in the Event of a Lawsuit***

If you are advised of any form of legal action against the Sierra Club or any of its affiliated entities, this information must be communicated to the Risk Management Manager immediately (415-977-5569). Leaders should report threats of litigation as well as actual notice of suit. Chapters and sub-entities should not engage their own counsel. The foregoing applies to complaints in the areas of libel and slander, copyright, employment, breach of contract, accidents, negligence, and any and all forms of liability.

The Sierra Club National Office, with assistance of the Insurance and Legal Committees, will retain outside legal counsel as necessary in order to work with the appropriate persons to resolve the legal matter. The Club’s preference is to avoid litigation and adverse publicity if at all possible. The Club entity responsible for the payment of legal fees will be determined on a case-by-case basis.

If you have received notice of litigation or potential litigation, do **not** discuss the matter with the press, newspapers, or any party that is not directly involved with the defense of the actions until or unless directed by counsel to do so. The goal is to maintain confidentiality and minimize inaccuracies, adverse publicity, and weakening of the Club’s case.



***Consult with the Chapter, OMC Chair or Safety Chair if you are in doubt what to do.***



## **Lost Persons**

*At the trailhead a leader should explain the Sierra Club procedure for lost people:*

*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. The Club’s years of outing 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 to rejoin the group before a search begins (Sierra Club Outings Department, *Outing Leader Handbook*, San Francisco: Sierra Club, 2007, 38).*

*The Outing Leader Handbook notes that this policy is not always followed:*

*With lost children, a leader’s emotions, as well as the emotions of parents and outing 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 and frightening a lost child with loud yelling, can make it even more difficult for experts to locate that child the next day. (39)*

## Medical Forms

These forms apply mainly to restricted trips and certain entities that require these forms.

### About the Medical Form

The Medical Form is designed to be used by trip leaders to find out in advance of special medical conditions the participant may have, rather than learning about them in a crisis. Also, in the event of serious injury or illness, the Medical Form provides emergency medical personnel with useful medical history information. After reviewing the form, the leader might need to contact the participant to discuss whether the trip will be safe and enjoyable for him or her considering his or her medical history.

By law, medical information must be kept confidential. It should be seen on a “need to know basis” by only the trip leaders, medical personnel, or others who know and understand its confidential nature. The medical form will be retained along with the participant’s liability waiver for a period of time following the trip, after which it will be destroyed. If the participant chooses not to go on the trip, this form will be destroyed immediately.

Just remember, as the leader you are in charge of your trip, and you decide who is appropriate to participate on it. You need to be as best-informed as possible so that you can make excellent decisions. ,

Leaders also should complete and carry a Medical Form.

Why is it important to obtain medical information?

- You are gathering information to ensure the trip is appropriate for each participant, to help you be better informed, and to be a more prepared leader. More information allows you and potential medical personnel to make better decisions and provide better treatment in the event of a medical emergency.
- You are not gathering information to exclude people from the trip, although that may be necessary in some cases.
- Knowing a participant’s prior medical history can help you determine whether this trip is appropriate for him or her. The trip could be too physically challenging (due to poor fitness) or could cause the participant harm (due to a dangerous medical issue).
- Knowing a participant’s prior medical history also helps promote group safety. A medical condition that incapacitates a group member could impact your ability to manage the group safety.
- In addition to being helpful to you in the event of an emergency, the medical history of your participants, the medications they take, and any allergies they have can be very helpful to advanced medical personnel.

The form can be found on the LTC website. See also Chapter 5.

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## Resources

- **Forms:** LTC website under Forms: [sierraclub.org/angeles/leadership-outings/forms-resources](https://sierraclub.org/angeles/leadership-outings/forms-resources)
- LTC pages on Safety Committee and Incident Reporting.
- [sierraclub.org/angeles/leadership-outings/angeles-chapter-safety-committee](https://sierraclub.org/angeles/leadership-outings/angeles-chapter-safety-committee)
- Safety Committee email: [safecomm@anegels.sierraclub.org](mailto:safecomm@anegels.sierraclub.org)
- OMC Chair: [omc@angeles.sierraclub.org](mailto:omc@angeles.sierraclub.org)
- The Performance Hub: learn more about Resolving Conflicts and Sierra Club Policies and Standards: <https://sites.google.com/a/sierraclub.org/performance-hub/accountability>

*Campfire Community is the new "Clubhouse" resource for leaders - a platform for Sierra Club staff and volunteers to collaborate, share their work, access information, and generally make their work easier. National Program Safety, Risk Management and Security are all found on Community.*

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## The Complete Angeles Chapter Safety Policy

### **Angeles Chapter Safety Policy (ACSP):**

**Approved by Angeles Chapter Executive Committee Nov. 20, 2016**

#### **1.0 Purpose**

This policy applies to the Angeles Chapter outings program and provides specific requirements for groups, sections, committees, and task forces (GSCs) to assure that outings consistently meet participant safety expectations and Sierra Club risk-management goals.

#### **2.0 Scope and Precedence**

This Angeles Chapter Safety Policy (ACSP) supplements national Sierra Club outings policies and the Angeles Chapter Outings Governance Policy and is applicable to all personnel involved in the Angeles Chapter outings program. This policy provides requirements for the Safety Committee to conduct its business and oversee chapter- and GSC-sponsored outings. This policy also provides detailed guidance for certain GSCs to prepare GSC Safety Policies and manage their outings program consistent with chapter and national requirements.

In any case where this policy is less stringent than national Sierra Club outings policies and the Angeles Chapter Outings Governance Policy, those policies have precedence. In cases where this policy is more stringent (e.g., the requirement for two leaders on outings), this policy shall apply.

#### **3.0 Angeles Chapter Outings Ratings**

A system of classifying outings has been established in the Angeles Chapter according to 6 levels of difficulty (C, O, I, M, E, T). Five of these levels correspond to leader certification levels (O, I, M, E, T) as described below

**Level C (Conducted):** Certain outings are conducted almost entirely under external control, such as by a concessionaire or ranger. During a conducted outing, the Sierra Club leader has little responsibility beyond administrative matters. Organizers of conducted outings require only minimal leader qualifications and, therefore, conducted outings are not included in the leader certification system.

**Level O (Ordinary):** O-Level outings are trips on trails or off trail with no navigation or terrain difficulty (class 1) and require basic technical skills of outings leaders and participants. New leaders

who have not led a backpack as a provisional leader are identified as O Level 1 (O-1) leaders who may lead day hikes and car camps but not backpacks. Such O-1 leaders may subsequently upgrade to O Level 2 (O-2) status by completing a provisional lead of a backpack.

**Level I (Intermediate):**I-Level outings include cross-country travel and possibly class 2 terrain. Leader qualifications shall include demonstrated navigation, cross-country travel, and backpacking skills in addition to the O-level requirements.

**Level M (Moderate):**Outings that involve class 3 rock or snow travel requiring the use of an ice axe shall be classed as M. Technical training in rock climbing and snow travel is required in addition to lower-level requirements. Leaders may be rated full M (both rock and snow), M-Rock, or M-Snow.

**Level E (Exposed):**Outings that involve class 4 rock or snow travel that requires the use of crampons in addition to ice axe for safety shall be classed E. Leaders are required to demonstrate more advanced skills involving rock climbing and snow travel than are required for level M. Leaders may be rated full E (both rock and snow), E-Rock, or E-Snow.

**Level T (Technical):**T-Level outings involve specialized technical skills (for example, sailing, kayaking, or ski mountaineering). These outings impose highly specialized leadership requirements, and certification of leadership qualifications shall be in accordance with the requirements defined by the entities that sponsor such outings.

#### **4.0 Related Committees**

In addition to the Angeles Chapter Executive Committee (ExCom)and the GSCs, the Safety Committee relates to several other committees, notably the Outings Management Committee (OMC) and Leadership Training Committee (LTC).

#### **4.1 Outings Management Committee (OMC)**

The Outings Management Committee is the Angeles Chapter committee responsible for managing all aspects of the outdoor activities program of the chapter, including training and risk management. The OMC promotes outdoor leadership and provides support for entity outings chairs.

#### **4.2 Leadership Training Committee (LTC)**

The LTC provides training of potential outings leaders in technical and non-technical subjects. LTC recommends qualified candidates to the Safety Committee for certification as Angeles Chapter outings leaders.

#### **5.0 Angeles Chapter Safety Committee**

The Safety Committee manages all safety and risk management aspects of the outdoor activities program of the chapter, including safety policies, publication review, accident investigation, policy monitoring, leader certification, and leader database maintenance.

The Safety Committee is led by the Safety Chair, appointed by the Chapter ExCom Chair and confirmed by the Chapter ExCom. Other Safety Committee members include the OMC Chair, the LTC Chair, the Wilderness Training Committee (WTC) Safety Coordinator and any other members specified by the current Angeles Chapter Outings Governance Policy and other Chapter Outings Standing Rules. The Safety Chair shall appoint additional committee members as needed to enhance judgment, expertise, and liaison functions of the committee.

#### **SAFETY COMMITTEE RESPONSIBILITIES**

##### **5.1 Policy review**

The Safety Committee shall review the ACSP at least annually to reflect changes due to new situations or to capture chapter experience in operating under it. The Safety Chair shall propose

ACSP revisions to the OMC. If the proposed revision is adopted by a vote of the OMC, it will become effective upon its confirmation by a vote of Chapter ExCom.

**5.2** The Safety Committee shall review and approve safety policies established by the GSCs. Policies judged inadequate by the Safety Committee shall be returned to the appropriate GSC for revisions.

### **5.3 Outings review**

The Safety Committee shall monitor published outings that appear in all chapter media, including the Online Activity Registration System (OARS) and its successors, websites, listservs, newsletters and the Southern Sierran. It shall also set standards for publicizing chapter outings on social media. It shall ensure that qualifications of leaders are appropriate for the outing and that mileage, elevation gain, and other trip characteristics are properly identified for participants. The Safety Committee shall communicate with the sponsoring GSC and request modifications of outings that exceed the qualifications of the leaders or participants. If the above is not successful, the Safety Committee shall direct the sponsoring GSC to cancel the outing.

**5.4** Outings write-ups approved by a GSC outings chair shall be provided to the Safety Committee for information as soon as possible (e.g., by email to [safecomm@angeles.sierraclub.org](mailto:safecomm@angeles.sierraclub.org) if they are submitted for publication in OARS or another chapter website or listserv). The outings chair of the sponsoring entity shall make suitable provision for seven-year archiving of the trip write-up if it is not published on OARS; no archiving shall be required for outings published on OARS.

**5.5** Upon request by a GSC outings chair, the chapter Safety Chair may grant authority for an entity to employ the nationally-defined "Enduring" Waiver procedure for their regularly scheduled conditioning hikes. This authority must be confirmed by the national Program Safety Team to take effect, and be implemented with full adherence to the "Enduring" Liability Waivers then current at the outings extranet of Clubhouse.

### **5.6 Incidents investigation**

The Safety Committee shall investigate outing incidents and complaints involving outings leaders. Depending on circumstances and steps taken by the sponsoring GSC, additional action may be taken by the Safety Committee. The Safety Committee shall assure that incident reports are processed and that copies are retained.

**5.7** The Safety Committee shall monitor national outings policies and forms for changes and notify the GSCs.

### **5.8 Leader certification**

Upon leader candidates' satisfactory completion of the LTC training program, the Safety Committee shall grant leader certification. The Safety Chair may also directly certify leaders based on previous experience, proven capabilities, certification with other club chapters, etc. The Safety Committee shall notify sponsors of provisional outings of newly certified leaders and update the leader database to reflect new certifications.

### **5.9 Leader database**

The Safety Committee maintains a database of currently approved leaders, providing the leader's name, membership number and expiration date, leader certification level, first aid certification (date of course completion and type of course--standard or wilderness first aid), and date of policy knowledge renewal.

## **GROUPS, SECTIONS AND COMMITTEES (GSC) RESPONSIBILITIES**

### **6.0 GSCs**

Angeles Chapter outings are sponsored by regional groups, activity sections, committees, and task forces (GSCs).

### **6.1 GSC Organization**

Each GSC is recognized by the Safety Committee to lead outings up to a particular certification level. Each GSC shall establish an appropriate organizational structure, select officers, recruit leaders, and provide resources as needed to conduct safe and successful outings at the indicated level.

GSCs that offer T-rated outings, provide training or conduct proficiency exams at the I-level or higher, or permit leaders to lead routes that are rated higher than their leader rating shall prepare a GSC Safety Policy (GSCSP) to supplement this Angeles Chapter Safety Policy (see section 7). Each such GSC shall review its GSCSP at least annually or if any major changes occur in the level and nature of outings conducted. A copy of the GSCSP shall be submitted to the Safety Committee for review and approval and subsequent archiving. Other GSCs that operate their outings entirely within the provisions of this ASCP have blanket authorization to operate their outings program and do not need to file a GSCSP.

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

### **6.2 GSC Outing Requirements**

With the exception of "conducted" events and certain outings as noted below, the GSC shall identify two appropriately rated leaders for each outing. If the GSC conducts outings that require additional leaders, the outings chair shall assure that additional leaders are provided.

The Safety Committee may sanction a GSC to lead specific outings (e.g., conditioning hikes with one leader per subgroup). If the GSC is so sanctioned, the GSC shall establish appropriate procedures for ensuring group control and safety.

If circumstances arise that impose greater difficulty (e.g., outings held in early spring), then the outings chair shall recognize these circumstances as the need arises and assign the outing a commensurately higher rating (e.g., an I-level outing with spring snow may become an M-level outing), and it shall be led only by persons qualified for the newly assigned higher level.

All snowshoe and cross-country ski outings must be led by two leaders certified at the I-level or higher unless a one-trip waiver is granted by the Chair of the Angeles Chapter Safety Committee for one or both leaders to be O-rated. Outings where the leader requires the use of traction devices such as Yaktrax or Kahtoola Microspikes are subject to the same restriction. Waivers will be based on such factors as the planned route and the experience of the leaders (e.g., have they led such trips and this particular route before?). Such waivers are required for any such trip published to be led by either two O-rated leaders or one I-rated leader and one O-rated leader. Any trip published to be led based on such a waiver must be canceled if there is heavy snowfall forecast on the day of the outing.

If the GSC conducts outings that involve special difficulty or that require special skills or equipment, the GSCs shall document additional procedures for the selection of the outings chair, leaders, and participants in their Safety Policy. Mountaineering outings requiring the use of technical equipment (ropes, ice axes, or crampons) shall receive prior approval by the national Mountaineering Oversight Committee (MOC).

Some GSCs conduct technical T-level outings (e.g., ski mountaineers, river touring) that encompass a broad span of specialized skills and difficulties. Outings chairs involved with T-level outings shall document criteria for leader selection and participant screening for safe outings under normal and possibly adverse conditions.

Some GSCs conduct training outings (e.g., navigation, rock climbing, and snow climbing). GSCs offering training outings at the I-level or higher shall document policies to screen participants properly and to conduct training outings in a manner commensurate with the risk to ensure the safety of participants.

Some GSCs conduct proficiency demonstrations (e.g., Leadership Training Committee and Ski Mountaineers) and shall document their policies to screen participants properly and conduct proficiency demonstration outings in a manner to ensure the safety of participants.

A GSC that is allowed to offer certain outings rated higher than the rating of the leader shall document this arrangement and its implementation in a GSC Safety Policy. The document shall indicate the ways in which safety and risk management are maintained.

### **6.3 Announcement Processing**

Each Sierra Club outing shall be sponsored by a GSC and shall be published in an appropriate form in order for the outing to be sanctioned as an official Sierra Club trip. By sponsoring an outing, the GSC is giving its approval to the outing plan and the outing's leadership.

#### **Role of outings chair**

The GSC outings chairs shall be responsible for collecting announcements from leaders and seeing that they are published. Announcements submitted by anyone other than the outings chair shall be approved by the outings chair prior to publication. Restricted mountaineering outings shall be approved by the national Mountaineering Oversight Committee (MOC).

Outings chairs shall verify that each announcement lists a leader and at least one properly qualified assistant, contains an indication of the trip rating (O, I, M, E), describes the difficulty of an outing (such as elevation gain, distance, pace, etc.), addresses the general demands on participants and any special skills required, and provides contact information for the leaders.

On reserved outings, for which participants apply in advance for a spot, the trip announcement generally will not include the meeting time and place. On non-reserved outings, for which participants show up without a reservation, the meeting time and place must be included in the announcement.

Outings with multiple sponsors listed shall be approved in advance by each sponsoring entity and must comply with the outings procedures of each entity. The primary sponsor must be listed first in the header wherever the write-up is published. The primary sponsor is the one that would take the lead, in conjunction with the Safety Committee, to investigate any incidents that occurred on the outing.

### **Outings publication**

Publication may be accomplished by GSC outings chairs submitting announcements to the Online Activity Registration System (OARS) or its successor. Publishing in a GSC newsletter, website, or listserv also qualifies, provided a copy of the announcement is forwarded to the Safety Committee publications monitor. A complimentary copy of all GSC-sponsored publications shall be sent to reviewers designated by the Safety Chair and the Angeles Chapter office.

Any schedule announcements not published in OARS shall be archived for seven years after completion of the outing. In the event an announcement is published only electronically (at a website or any other non-print medium other than OARS), a hard copy of the announcement shall be archived for the seven-year period.

### **Social media**

After publication in OARS or a GSC newsletter, website or listserv, outings may be publicized through social media (such as Facebook, Twitter, Meetup or Craigslist) at the discretion of the sponsoring GSC. All such publicity shall mention "Sierra Club" or "Angeles Chapter" or the name of the sponsoring group, section or committee in the social media post or be prominently displayed in the account name for the posting. All such publicity shall also contain a hyperlink to the original publication in OARS or a chapter website; this link may be a "short link," such as those provided through bitly.com and tinyurl.com.

### **6.4 Verification of Leader Qualifications**

Outings leaders are trained and rated through a chapter-approved leadership training program conducted by LTC and structured to be compatible with the leader requirements for rating levels O through E. Experience and training other than that obtained through a leadership training course may be recognized as a partial basis for leadership certification. Leadership certification is done by the Safety Committee following a leader candidate's completion of all appropriate training, demonstrations, and provisional leads.

Outings chairs shall verify that leaders meet the following criteria at the time of the outing:

- a. Current Sierra Club membership,
- b. Certification as a rated leader at or above the level of the outing,
- c. First aid certification within the last four years before conduct of an outing,
- d. Leadership "soft" skills competence demonstration (e.g., OLT 101 completion and having read the Chapter Supplement to OLT 101 – or the equivalent of these two as identified by LTC) within the last four years.

Any waivers to these requirements for specific individuals must be approved by the Safety Chair.

Outings chairs shall verify that leaders possess adequate knowledge, skills, experience, and mental aptitude commensurate to the outing and are capable of effective control of the group during the outing.

Outings chairs shall verify that leaders know the basic procedures for conduct of the outing and know Sierra Club emergency procedures. Sponsoring GSCs may elaborate upon the Chapter's Rules of Conduct in their safety policies to match their outings characteristics.

Outings chairs shall verify that leaders of proposed outings be in sufficient physical condition to complete the outing and handle emergency situations, be familiar with the areas to be entered, and have a good idea of the conditions to be encountered during the outing.

Outings chairs shall verify that leaders of technical outings (especially T-rated outings) have appropriate training and certification(s).



## **6.5 Leader Responsibilities**

Once adequate information is gathered for an outing, the leader prepares an announcement and submits it to the outings chair. Following publication, interested participants evaluate their interest and suitability for a particular outing and may contact the leader for further clarification. The leader answers inquiries so that participants understand the demands of the outing and can make more reasoned judgments on whether they should attend.

### **Screening before the trip**

On reserved outings, the leader shall perform screening in advance of the trip. Once screening is completed and the participant list takes shape, the leader normally sends out a trip sheet to participants, detailing where and when to meet, what to bring, how to prepare, and what to expect. The trip sheet normally includes participant contact information to allow participants to make individual carpool arrangements to arrive at the meeting point on time, fed, rested, and ready to go.

If two appropriately rated leaders are not available at the start of the outing, the outing must be re-planned at a level consistent with available leaders or canceled. Trips canceled for this reason may not be led as "private" outings, unless all participants are notified before leaving home.

### **Carpool**

The carpool to the trailhead is never part of the Sierra Club outing, and leaders should not suggest or imply that the outing begins with the carpool. Leaders shall avoid accepting responsibility for travel to, during, or from outings, leaving that to private, voluntary arrangements. If there is a carpool from the meeting point to the trailhead, the waiver should be signed before the carpool.

### **Waiver**

A waiver is required for participation in any Sierra Club outing. Leaders are responsible for collecting waivers from all participants. At the start of the outing, leaders shall provide a sign-in/waiver sheet to obtain information on each participant, including name, car license, and emergency contact.

Participants should sign the liability waiver at the initial trip meeting place, thus providing participants an opportunity to back out of the outing if they decide not to sign the waiver. Digital waivers can be accepted in accordance with National requirements.

Leaders should ensure that participants are prepared to follow the Rules of Conduct established by the Sierra Club and Angeles Chapter. During introductions, leaders shall inform participants of the rules that govern conduct on an outing.

The leaders shall check that all participants are properly equipped and qualified for the outing, either through pre-screening or at the trailhead or both. On non-reserved outings, the meeting point is the first opportunity to screen participants.

During the outing, the outing leaders shall exercise control of the group and are responsible for the outing's safe conduct. This includes compliance with the requirements and procedures established for safe outing conduct. Leaders shall keep the group together and under control at all times.

The leaders shall modify the outing plan as necessary to avoid exceeding the capability of the group. The leaders shall abort the outing objective if circumstances prevent its completion in safety.

During the conduct of an extended outing, if two rated leaders are not available for any part of the planned outing, a fully-rated leader may appoint an experienced participant to assist in conduct of that part of the outing. Such a participant must be a Sierra Club member. Before doing so, the leader must make the determination that the outing plan may be safely completed with the remaining group. Following any outing during which a fully-rated leader appoints a participant to assist in conduct of

part of the outing, the leader shall report the circumstances to the outings chair and to the Safety Committee Chair.

Any participant leaving the outing before its completion shall be signed out, consistent with national policy ("Early Sign-Outs"). Sign-out of all participants at the end of an outing is at the leader's discretion but is particularly prudent in the case of more remote outings to ensure no one is left behind.

### **Archiving sign-in/waivers**

Following an outing, sign-in/waiver sheets shall be archived by the GSC outings chair for a period of seven years.

For a normal outing without accident or incident, no further follow-up is required.

### **6.6 Accident/Incident Procedures**

If an accident occurs during an outing, the leader is expected to limit the situation to avoid any further injuries, appoint someone to document the events, then render assistance to the injured. Often an incident necessitates holding the group together for a prolonged period and may involve the entire group missing work the next day or until the situation is remedied. It is important that the vitals of the patient(s) be recorded at regular intervals and that injuries and treatments be recorded. In medical and legal parlance, if it isn't written down, it didn't happen. Also, a written record may prove vital to defend the leader's actions months or years later during an investigation.

Following an accident/incident, the leader shall file a report with the Safety Committee and National.

Subsequent to filing the incident report the GSC shall investigate all accidents and complaints, take action as appropriate, and file their analysis with the Safety Committee. The GSC shall support the Safety Committee investigator as needed.

### **7.0 GSC Safety Policies**

The following guidance is for GSCs that need to maintain a GSC Safety Policy. While adherence to the structure suggested below for a GSC safety policy is not a requirement, GSC safety policies shall be audited for content in each of the following areas. Therefore, policies that are structured with the following points in mind will be much easier to evaluate and approve.

#### **GSC Organization**

- A1 Indicate the GSC name and highest level of outings the GSC is authorized to conduct;
- A2 Indicate the title of the person(s) responsible to write and approve the GSCSP;
- A3 Indicate the outings chair selection criteria;
- A4 If applicable, if the outings chair does not use the listserv, indicate the person responsible for forwarding listserv messages to the outings chair;
- A5 If applicable, indicate whether the GSC has any special approvals on file for one-leader outings;
- A6 If applicable, indicate whether the GSC has any special approvals on file for outings that involve special difficulties or special skills and equipment;

#### **GSC Outings**

- B1 Describe the types of outings conducted by the GSC;
- B2 If applicable, describe how waivers and sign-in sheets are handled before, during, and after the outing;
- B3 If applicable, describe any large group events that require more than two leaders;
- B4 If applicable, describe any one-leader outings;
- B5 If applicable, describe any outings that involve special difficulties, skills, or equipment;
- B6 If applicable, describe procedures used for any restricted trips, including MOC coordination;

B7 If applicable, describe any criteria for upgrading the level of an outing due to adverse conditions;  
B8 If applicable, detail any T-rated outings including leader selection, participant screening, and any special grading systems used;  
B9 If applicable, describe any outdoor training conducted by the GSC, including qualifications of leaders, instructors, and participants and how risks to students are controlled;  
B10 If applicable, describe any outdoor proficiency demonstrations conducted by the GSC, including qualifications of leaders, examiners, and participants;  
B11 If applicable, describe any arrangements whereby a leader of a particular rating may lead a route at a higher level.

### **Announcement Processing**

C1 Describe the method(s) used by the GSC to satisfy the publishing and archiving requirements, especially if electronic publications are used;  
C2 If applicable, detail any special rating systems, other than mileage and altitude gain, used in the publication of outings to indicate strenuousness or technical demands;  
C3 If applicable, describe procedures for any jointly-sponsored outings;  
C4 If applicable, list any outings-related books, manuals, or newsletters published by the GSC, and frequency of publication.

### **Leader Qualifications**

D1 Describe the GSC criteria for approving a leader (especially one with previous accidents, complaints, or disciplinary action) to conduct a particular outing;  
D2 If applicable, describe any GSC-specific directives that elaborate upon the chapter's Rules of Conduct and how leaders become aware of any such GSC specific directives;  
D3 If applicable, explain how any T-rated leaders receive technical training and certification.

### **Leader Responsibilities**

E1 Describe or provide representative example(s) of trip sheets provided to participants before the outing to help them assemble their equipment and prepare for the outing;  
E2 Indicate how trip participants are screened to assure that they have the skills required for the trip and to identify those with medical conditions or a previous history of complaints or disciplinary action;  
E3 If applicable, describe any special procedures used to assure the technical skills of participants (e.g., the mountaineers list).

### **Accident/Incident Procedures**

F1 Describe how the entity is set up to handle emergencies, reports, and follow up activities and how these procedures are coordinated with leaders before an outing;  
F2 If applicable, explain any special emergency procedures employed by the GSC for the scope of its outings.



Onward to chapter 4



# 4

## Outings Leadership and Emergency Procedures

### LEADERSHIP QUALITIES

#### Good leaders

- Accept responsibility;
- Always are learners, seeking to improve their leadership skills;
- Know appropriate outdoor skills and practices;
- Organize and delegate;
- Plan safe, enjoyable, and environmentally appreciative trips;
- Are enthusiastic, energetic self-starters, who follow through;
- Remain poised and confident under pressure;
- Exercise a sense of humor;
- Are congenial and considerate;
- Are tactful and understanding, yet firm and diligent;
- Have patience with the inexperienced;
- Restrain the overenthusiastic;
- Are effective communicators and good listeners;
- Encourage others;
- Are flexible;
- Willingly impart knowledge and skills to others;
- Recognize their own limitations, capabilities, and shortcomings;
- Identify potential leaders.

*Sierra Club Group and Outings Committee,  
Outing Leader Handbook "The Redbook,"  
San Francisco: Sierra Club, 1998, pp. 5-6.*

As the leader, you are responsible for safely achieving the published goals of your trip. Sierra Club trips are planned to be enjoyable and environmentally sound; to reduce whatever hazards may exist and to increase the enjoyment of all, certain rules should be followed and various precautions taken. This can be accomplished by planning and good judgment - with a minimum of orders and regimentation.

Good leadership can be more important to successful outings than technical skills. Leadership has many dimensions and can be viewed and assessed in multiple ways: behavior of the leader, internal motivation of the leader and group members, performance of individual outing participants, the interpersonal dynamics of the group, or objective performance of the group as a whole. Besides the mechanics of leading a trip for the Angeles Chapter, this chapter delves into the components of leadership as an aid to prospective leaders and offers perspective on leadership with the goal of enhancing the performance of leaders and the groups they lead.

The best leaders are aware of their limitations and personal motivations, and they are aware of the style of leadership they are expressing.

The best leaders become good judges of when it is prudent to shift styles in reaction to changing conditions. Just as leaders will be conscious of

their own style and performance, they know they will be closely watched by members of their party looking for models of successful or dysfunctional leadership.

# Outings Leadership

## Psychology of Leadership

Successful leaders reflect a variety of personal profiles or personalities. There is no perfect leader profile, but the outings leader should possess certain qualities, common to many successful leaders, in reasonable degree. Qualities such as:

- physical fitness appropriate for the outing.
- the right technical knowledge for the type of trip
- planning and problem-solving skills
- confidence and decisiveness
- supportiveness and approachability
- capable of demonstrating the best leadership standards that reflects well upon themselves, the Sierra Club, and the outings community.
- collaborative: the two (or more) leaders of an Angeles Chapter outing need to work well together.

The psychological factor involved in outings is often difficult to detect in the field until too late and sometimes surprisingly hard to describe and understand after the occurrence. But its influence cannot be overestimated in the outings environment.

An effective leader is a confident leader. A vacillating leader, or one obviously not in control of oneself, can do irreparable harm to the psychological set of a group and its members. Alert for the early signs of psychological deterioration in group members, the leader will check with the assistant or co-leader to determine the presence of those attitudes and actions which may be symptomatic of an undesirable psychological state, and thus, of future trouble (running ahead, lagging behind, bravado, excessive competition, groundless fears, inexplicable exhaustion, unusual irritability, or incessant complaining).

Beyond checking for symptoms in a particular person, the leader must also consider the possibility of impending *group* psychological deterioration. This can stem from one or two anxious persons gradually “infecting” others, or it can happen suddenly to the group as a whole. This latter situation can be the result of monotony or physical and nervous exhaustion. Often, it will stem from the group’s disappointment (and perhaps disagreement) with the leader’s decision to turn back, skip lunch, impose regulations, bivouac early, or leave camp before dawn.

A negative psychological set, once established in the group, has high potential for future trouble. One “leader error” or one “unexpected” natural event (e.g. a white out) may precipitate panic or rebellion. The successful leader THINKS AHEAD and by words and actions precludes or greatly minimizes the possibility of group deterioration.

There is no one right course of action for the leader confronted with an adverse psychological situation. In general, the leader should remain calm, display objective interest in the person who may be upset, listen and observe more than talk, and discreetly discuss the situation with the co-leader (and perhaps another knowledgeable person). The leader must exercise judgment and make a decision based on experience, training, and problem-solving ability. Once made, the decision should be explained to the person (and the group, as appropriate) and then implemented, politely, but firmly and rapidly. Judgment is what leadership is all about.

## Styles of Leadership and Roles of the Leader

The leader serves as the balancer of the many polar elements of group activity: structure versus flexibility, adventure versus safety, cohesion versus individuality, personal security versus growth, goal versus process, and others.

Although a particular style of leadership may be most effective in a given situation, in most cases the difference in results is small, and leaders can express their individuality. In pursuing a proper balance, an effective leader will adjust style to the situation. Leadership style is an interplay among the amount of task-oriented direction the leader gives, the amount of emotional support the leader provides, and the maturity or competence that group members exhibit in specific circumstances.

The definitions of leadership are many. Without settling on a single version, survey results from hundreds of outings show that participants expect leaders to be good at organizing and planning; be self-confident; be technically competent in skills such as first aid, route finding, and reading the weather; care for other people; make good decisions; be trustworthy; communicate well; inspire others to do their best; build and maintain morale; be good teachers and coaches; be able to deal with difficult people and handle conflicts; be able to build and maintain teams; anticipate problems and deal with them proactively, and be welcoming and inclusive of all participants. This is certainly a heavy obligation. Leaders approach such responsibilities and expectations in their own manner and style. Here are some generalized examples of styles.

### Equals/Peers

In many circumstances, particularly private trips, the participants are nominally equals and have comparable levels of skills; each relates as a companion. They mutually agree on objectives and style (aggressive or casual) and the degree of commitment expected of everyone. Responsibility for safety of the party is shared, if unspoken, and no structured leadership is required - as long as things go well.

### Teacher / Coach

Another style of leadership is that of teacher or coach. Most outings are not specifically training events, nor are leaders intended to be instructors, but outings participants often comment that they want to learn things as well as do things. Skills and knowledge gained from more experienced outing members are big reasons for participation and a primary means of increasing the skills and confidence of Sierra Club members, even though all participants are nominally expected to be similarly competent. The designated outing leaders can provide great value by verbalizing context in a teachable moment. Participants universally report appreciation when their uncertainties are resolved or new skills are conveyed by a few simple pointers offered by the leader.

### Guide / Autocrat

One final leadership role should be mentioned by way of contrast, that of *guide*. A guide is paid to accept all responsibility for the party and for every member achieving the stated objective, sometimes even when doing so sacrifices other rewards of the outing. The members of the party are likely to be *substantially unskilled*, compared to the guide. An autocratic guide may not even inform the party of upcoming events. The authority of a guide is absolute, but so is the responsibility. The guide may even be responsible for providing equipment and preparing meals. (Sierra Club outings leaders are not guides, even though their decision-making authority during an outing is akin to that of a guide - see the Rules of Conduct. Our trips are not "Guided trips.")

Leadership on Sierra Club outings can be a dynamic combination of the various styles discussed above,, but our outings have certain basic and perhaps unique aspects that are designed to ensure that participants will be able to enjoy and complete a trip, while they also come home with more respect for the natural world.

## Screening Participants

As a part of assembling a hiking group, a Club leader may need to screen participants, with the selection process becoming more rigorous for more demanding outings. The leader first describes the outing for a published listing in a way that allows participants to “self-select” based on their own abilities.

- Leaders will note difficulty level in the writeup, i.e. “easy,” “moderate,” or “strenuous.”
- A wise leader will describe the outing relative to the “average” participant - for example, what might be a moderately paced hike for your usual group might be “fast paced” or a “Tiger” hike for participants who haven’t hiked with you before.
- Leaders should aim to be welcoming and inclusive throughout the process, while setting forth standards and gear requirements.
- See Chapter 1 for more on writing up your outing.

For most “O” level hikes, especially conditioning hikes, the published outing description will be the only information the potential participant will have in order to gauge their own suitability for the outing before showing up at the trailhead. Participants may be required to have specific footwear, the 10 Essentials and several liters of water. A participant can be denied a spot on a trip if they do not have what the leaders have asked for. Thus many “O” level hikes can present leadership and group management challenges that aren’t likely to come up on outings that require advance pre-screening (backpacks, or I, M, E rated trips).

For outings that call for an additional “layer” of screening, the leader will ask potential participants to get in touch before the outing; the leader then may send out more details, providing another opportunity for self-selection, and an opportunity for the leader to determine a participant’s readiness for the trip. As part of screening, the leader may ask other leaders who have been out with the applicant whether they feel the applicant is appropriate for the outing. “Inappropriate” does not necessarily mean that abilities are below the requirements; a fast, impatient hiker on a modest outing can be as disruptive as a slower, distracted participant.

Screening criteria should not be relaxed for friends and family members of leaders or participants. Although an unprepared participant may be rejected at the trailhead or signed out after the trip commences, screening should be accomplished primarily in the reservation process if possible. A questionnaire may be used to assess the suitability of the participants for a particular outing.

“Placeholdering” should not be granted nor promised prior to publication of the trip description, and all prompt applicants should receive bona fide consideration. A leader legitimately may inform friends about trips in a forthcoming publication and urge them to apply promptly after publication to maximize their chance of acceptance.

The location and nature of the trip will influence the size of the group along with factors such as permitted group size limitations in various wilderness areas, parking at a trailhead, climbing safety, and time margins, and low-impact travel.

For trips requiring additional skill levels (like backpacks or I, M, E rated outings), the leader requests a hiking / climbing resume with background information to assess the applicant’s ability and capability for the trip.

### **Screening and the Americans with Disabilities Act (ADA)**



*Leaders are expected to make every reasonable effort to accommodate participants on trips of all abilities. If a potential participant has a documented disability, there are additional criteria that must be considered; these are in accordance with the Americans With Disabilities Act (ADA):*

- 1. Reasonable accommodation: Can the person take part in the outing without the Club's incurring excessive cost or expending excessive effort to allow participation?*
- 2. Safety: Can the person take part in the outing without endangering him- or herself or others?*
- 3. Fundamental nature of the outing/activity: Can the person take part in the outing without fundamentally changing the nature of the activity?*

### **Screening For Restricted Mountaineering Trips**

Participants, including leaders should provide two copies of the Medical Form. The form can be used as part of the screening process. If a leader has questions about a person's ability to participate on a mountaineering outing because of a medical condition, the leader may discuss it with the participant or ask the participant to get written approval to participate from their physician

One copy should be carried on the outing in case of an emergency, so it can be handed over to emergency personnel along with an emergency-patient form. If there is an accident or illness, the form may help first aiders and medical personnel. **All information on the form should be kept confidential.**

- A second copy of the Medical Form can be left at home during the trip, to be sent to the outings chair after the trip as below. **See the end of Chapter 3 for more about this form.**

#### ***After the trip***

- If there has been an incident, forms may go with that report. Ask your outings chair and/or us at LTC or Safety.
- All sign-in/waivers and medical forms should be sent to the sponsoring entity's outings chair.

### **Screening at the Trailhead and During the Outing**

A leader can describe the outing again, perhaps adding data on weather and route conditions, and allow applicants to opt out. The leader has the responsibility at that time to ensure that every participant has adequate personal equipment and supplies, providing another assessment of competence.

Finally, even after the outing commences, the leader can make the uncomfortable decision to require a participant to sign out if it becomes obvious that his or her abilities will impair the group and if it is safe to do so. Social pressure should not compel an outing leader to include participants who are unsuitable for the planned activities; doing so can be unsafe for the individual, unwelcome for the group, and damaging to the leader's regard. For more about Signing Out, see Chapter 3, Signing Out: The Rules.





*Remember that an outings leader accepts the responsibility for the physical as well as the emotional safety of every group member. See Chapter 3 for Signing Out guidelines.*

When all is going well, seemingly little leadership is needed. That things are going well indicates effective leadership has already taken place. When problems arise, it is most often due to previous lapses in leadership. Sierra Club leadership training and outings protocols emphasize the small actions leaders must take to head off big problems later on.

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## Objectives of Successful Leadership

A good part of personal growth and the enjoyment of outdoor adventure comes from surmounting risk; risk is a component of adventure. The leader's primary responsibility is to balance risk and adventure with individual and group safety. In modern leadership parlance this is called risk management; every outing is in some way a balance of adventure and safety.

### Risk Management

Risk management is first *proactive* and then, in an emergency, *reactive*. Nearly all accidents described in compilations of accident reports could have been prevented by more effective risk management, and very few are actually due to unforeseeable hazards or circumstances beyond the leader's influence. Foresight is never as acute as hindsight, however, and when unplanned incidents do occur, leaders must step forward to direct the best resolution.

Incidents, which is perhaps a better term than "accidents" as it does not imply unpredictability, occur at the unfortunate confluence of environmental hazards (such as weather, terrain, rockfall, or equipment faults) and human factors (such as gaps or weaknesses in planning, skill, leadership, communication, or physical conditioning). The skills that a leader employs to strike the optimum balance between adventure and incident come from self-knowledge, training, modeling other leaders, and thoughtful experience.

All these point to a basic strategy: apply a keen awareness of environmental hazards and anticipate their impacts to avoid or minimize adverse consequences, optimize the human factors, and have a plan to deal with incidents should environmental hazards unavoidably overwhelm human factors.

As an example, the most common emergency incident is probably the unaccountable separation of individuals from the party. This can occur for many physical reasons: brushy or indistinct trails, intersecting trails, gastrointestinal issues, exhaustion, and so forth. Deterrence is achieved by preemptive human intervention: advising the party regarding known problem points, keeping all of the group in visual contact and regrouping frequently at trail junctures, and having a plan to minimize the consequences should this incident arise. The consequences range from a time-wasting inconvenience for a group hike on a local trail to life threatening—for the separated individual or for the balance of the party that must conduct a search in impending darkness, such as on a ski mountaineering tour.

Group safety is not solely the leader's task, but it is among the leader's responsibilities to involve other members of the party actively in the overall risk management strategy. Communication is key. The leader can brief the group on objective hazards ("We'll each need two liters of water today"), promote collaboration

("Let's all keep an eye on the weather"), and monitor impairments ("Let me know if that ankle gets worse"). The Angeles Chapter requires the demonstration of higher levels of leader competence to reflect the increased demands on risk management as environmental hazards and the adverse potential of incidents become more serious, reflected in the O, I, M, and E trip and leader ratings.



*All leaders are expected to conduct every outing with the safety of participants as the foremost objective. See also Chapter 3: Safety*

## **Positive Group Experience**

A positive group experience is central to a successful outing; it begins with the sense of belonging to a group.

### **Inclusion and Creating a Welcoming Environment**

How do skilled leaders create a sense of group identity? By creating and demonstrating a constant, consistent, and obvious policy of inclusion. Sierra Club outings leaders can use their own personal leadership style to achieve the goal of inclusion. It can begin with brief introductions in sign-up confirmations, but it really gets going with introductions at the trailhead. Although this is a time when the natural tendency is to minimize the chatter and get on with the hiking, a wise leader will take the time to draw out participants just enough to send the message that a group is being formed and that this component of the outing is important. Investing a few minutes can produce considerable benefit later on. The leader can see that the group starts its hike smiling and chatting with one another, rather than everyone silently hunkering down for the forthcoming trudge. And that is only the beginning of creating a memorable trip for everyone.

### **Sharing Responsibilities and Delegating**

The next component of a positive group experience is allowing others the sense of personally contributing to the success of the group. Here are some ways to accomplish this:

- Distribute responsibilities and chores among group members rather than taking on every task personally. Underscore the importance of individual contributions with praise in front of others.
- The primary leader is not required to direct every task and may choose to let group dynamics guide the selection of a situational leader (e.g. to set up a camping dining area), so long as other criteria, particularly risk management, are met.

Any time leaders give more autonomy to the group, they must consider whether doing so might be unsafe or reckless or could jeopardize objectives. Doing so, however, may allow the group to build its sense of unity and lay the groundwork for individual members to grow personally. It is not necessary for leaders always to act as if they are the most competent group member in every respect, neither is it necessary for leaders always to be at the front in every activity.

A competent and confident leader may move another person to the front in order to take the opportunity for other components of leadership, such as getting to know participants, coaching, assessing competencies that may be called upon later, or surveying the physical and psychological condition of the party.

The leader may suggest "Tracy, will you lead us up this section to the trail junction?" Such an action is not a relinquishment of leadership responsibility, but is a mature acknowledgement that outings may have complex objectives and that meeting more of them will result in a better experience overall. The leader can demonstrate expert group management by allowing someone else to demonstrate their skill or grow in confidence.

Sometimes risk management requires the leader not be first, as might be the case when a climbing party rappels and the assistant should go first to allow the leader to check, belay, and possibly coach each person. Knowing when to be first and when not to be is part of the situational judgment that good leaders develop.



***Delegating responsibility for tasks is not the same as giving up responsibility for making decisions.***

An outing group is not a democracy. A leader must carefully consider whether asking for a “vote” to reach a decision will have a negative effect, as participants may then view the leader as indecisive. In the backs of their minds, participants want to know they can rely on the leader to make critical decisions should the need arise, particularly when safety or other important objectives might be at risk.

A dictatorial leader may be shunned and a “too relaxed” leader may cause concern for safety, even though both lead outings that achieve their stated objectives without incident. For nearly all participants, achievement of nominal objectives is not the foremost reward of an outing, though it is high on the list.

When direction is required, a leader provides it by clearly stating the message in complete and specific terms. To ensure the directions are understood, a leader may repeat a request or directive and pay close attention to the person being addressed and ask for feedback.

### **Achievement of Stated Objectives**

The leader begins the process of achieving the outing’s objectives by stating them clearly, first in the published write up, later at the trailhead and throughout the outing. Articulating a vision of the outing’s success serves to clarify the goals and get buy-in from participants. Of course, the total list of objectives may be complex; leaders need to acknowledge objectives other than the nominal, prioritize them, and let the group know the priorities and the bounds of flexibility with which objectives and milestones might be changed.

Wise leaders know that participants have unspoken personal objectives that they associate with the nominal objectives of the outing; this provides individual motivation and a sense of personal accomplishment. Even when buying in to the nominal objectives of the outing (“climb Mt. Hazelton”), individuals may have a variety of secondary personal objectives (bag a certain peak, complete any challenging climb, view nature, learn camping skills).

A leader must focus on group accomplishment and recognize success in terms of the group’s performance, while all the time realizing that a fundamental element for success is the harmony of personal objectives among an outing’s leaders and participants. To promote that harmony, the leader will praise the group when milestones are reached (“Good work, folks, we made it to the lake right on schedule!”), but will also realize that each person is striving to reach personal milestones that should also be recognized and celebrated. The leader faces a challenge of balancing task-oriented direction (achieving group objectives) and providing emotional support (achieving individual objectives) but can meet that challenge by sensing how individual participants and the group as a whole are doing both physically and emotionally and using this assessment to choose appropriate leadership strategies.

### **Individual Motivation and Personal Growth**

A certain amount of self-sacrifice is required of an outings leader, as the best interests of the party come before the personal needs of the leader. To accept this role successfully, leaders need to have a good deal of self-knowledge and self-confidence—leading outings is not a means of proving oneself.

Usually, leaders must confront their limitations more forthrightly than any other party member while expressing a genuine interest in every participant that transcends their own emotional needs. The self-exploration and personal growth demanded of good leaders can require more courage than facing the most daunting environmental hazards or technical difficulties.

Self-knowledge, as well as compatible styles and coincident motivation, also applies to the leader's selection of an assistant or co-leader. Conflict between the leader and the assistant results in a mediocre outing, even if nominal objectives are met.

When a participant remarks, "Yeah, we got the peak, and the scenery was great, but I really didn't get much out of it," this translates to emotional needs not being met. Leaders can get a grip on this problem by realizing that needs are a hierarchy and that somewhere in that hierarchy that person's needs were not met or were threatened. Such needs as A. Maslow's classic hierarchy:

- physiological needs (warmth, food, water, etc.)
- safety and security
- affection, friendship, and belonging
- esteem and self-actualization

All individuals—leaders and participants alike—have emotional needs that are uniquely associated with tangible accomplishments that may or may not be among the identified objectives of the outing. By understanding this, leaders can more effectively ensure that all participants achieve the personal rewards and growth they are seeking, even though becoming personally acquainted with everyone on the outing may not be possible.

### **Take-Away Value, New Skills and Mentorship**

Each of us has benefited when a more experienced person gave us a little tidbit of knowledge: a take-away skill that we remember long after the outing. While outings leaders are usually not intended to be instructors, leaders and assistants have a tremendous collection of skills and knowledge that are eagerly soaked up by participants—who report that this is a major reason for participating.

Transferring skills and knowledge is a step closer to full mentorship--another great way to build up a cadre of new leaders and participants. Mentoring can take several forms: actively teaching skills (navigation for example) and demonstrating best leadership practices to leader candidates in the field: sharing with receptive participants why one route is better than another, why one campsite is more suitable, and so on. Some outings and GSCs actively promote teaching. The Chapter's Wilderness Travel Course is a teaching entity; although their summer backpacking trips are not for instruction, it is nearly impossible for participants not to learn from the experience as well as from the leaders.

Leaders should be sure their skills are kept up to date to avoid perpetuating wisdom that is no longer wise. And, note that experience is not the same as knowledge, skill, or wisdom—experience can mean making the same mistakes over and over, until sufficiently stressful circumstances finally reveal the deficiency.

## Environmental Activism

For well over one hundred years the continuing purpose of Sierra Club outings has been to promote environmental activism. People are more likely to fight for and preserve areas they have explored. A leader can contribute to this by describing plants, animals, and geography of the natural environment—or threats to it—encountered during the outing. Historical tidbits and the names of pioneers are readily absorbed by every participant, who appreciate a leader’s taking the time to do the research and tell the tales.

Leaders should always model environmentally conscientious behavior such as Leave No Trace practices. Some outings are more specifically focused on environmentalism and activism. The members of the Angeles Chapter have led trips branded by “Places We’ve saved,” such as outings to the Mojave National Preserve. Local places such as the San Gabriel Mountains and the Santa Monicas, and our SoCal wetlands have received the benefit of leaders’ support. Another type of trip - but one with a lot more sweat - is trail maintenance, such as events sponsored by the Santa Monica Mountains Task Force or the Forest Committee.

It is said that a group is a collection of people with common objectives, and that a team is a group with common values. On Sierra Club outings one shared value is a desire to preserve and protect the natural environment, and every leader has the responsibility to build upon this value. Learn more in Chapter 2 about the Club’s mission and how conservation plays a key role in everything we do. Find your own ways to incorporate these themes in your outings by doing some research ahead of time. A leader who freely shares their knowledge gains a lot of respect.



*See Chapter 2’s conservation section and look at the Club and Chapter conservation priorities.*

### Handling Conflicts and Problem Participants on Outings

Simple misunderstandings can and do happen before during or after an outing. Most of these are easily resolved by the leader who may need to clear up some confusion about a gear list, or a participants’ fitness, or other trip details. Occasionally, conflicts arise during a trip when a participant wants to stay behind, or has issues with other participants. These rare instances require patience and good diplomatic skills. Remember that the Rules of Conduct (Chapter 3) govern conduct on outings and it’s handy to have them with you.



*See Chapter 3 for more on: the Rules of Conduct; Dealing with Conflicts - some simple steps; and Signing Out rules including signing out problem participants*

### Handling Emergencies

In the event of an emergency, the style of leadership is no longer discretionary. The leaders must step forward and orchestrate the individual and group actions necessary to resolve the emergency. Organization and reassurance are critical; hasty or panicked actions must be avoided.

The emergency may arise because of injury to a party member, encountering a person in distress from another party, an unexpected change of weather or other objective conditions, or the realization that the party is lost or in imminent danger. The most common emergency incident is probably the realization that a member of the party is missing or that the party has become split up with no plan of how to reunite.

If the leader is not present or is injured, the group may be momentarily paralyzed. The co-leader / assistant leader must immediately take over. If neither is present, it is imperative that an acting leader be selected. This can be done by someone volunteering to assume the role of leader, verbalizing the need for a single leader and perhaps nominating someone, or simply by assuming the role and taking action.

In an emergency situation the objective of the leader is not to perform all the necessary tasks personally, but rather to identify the necessary tasks and ensure that they are carried out. The skill required is management, not technical expertise.

For example, instead of being the primary provider of first aid, the leader may enlist another qualified and willing person to provide first aid. Another person may be enlisted to solicit extra water, warm clothing, or go out to the trailhead and call for help.

The most important concern for the leader in an emergency situation is the safety of themselves and the party; providing aid to an individual is secondary. The role of party members in an emergency is to support the leader, carry out assigned tasks, and report relevant information to keep the leader apprised of all aspects of the situation.



**See Chapter 5 for First Aid considerations.**

*Some advice is given in this chapter about what to do when a party member is lost, but what if the whole group is off route? Chapter 6: Navigation gives practical advice, whether you are on a trail or cross-country, but leaders should consider how best to handle the situation for the group dynamics.*

*What if a participant challenges a leader's authority or ignores it? How can a leader best handle a sudden deterioration of group morale? How can a leader help the group endure a bivouac? Learn more later in this chapter about hazards and emergency operations.*

## **Group Members as Effective Followers**

Leadership qualities are not limited just to the outing leaders. Every outing leader hopes that each member of the party will exhibit effective *personal* leadership by setting high but achievable personal goals, taking responsibility for personal and group objectives, showing willingness to go beyond personal comfort zones and be exposed to growth, interacting effectively with others in the group, and accepting assignments and carrying them out cooperatively and effectively should an emergency arise.

Participants need to remember—and perhaps be reminded—that they are signed up for the duration of the trip; in the event of an emergency, such as the injury of another member, participants may not sign-out for their personal convenience but are expected to help as directed by the leader.

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## **Leading a Trip**

Leading the trip includes several steps that take place even before the group sets out from the trailhead. Successful outings are ones that are well-planned, starting with the leaders' physical readiness and their practical preparation — from research to trip planning, route selection and assessment of time and distance. These principles apply to all levels of trips, with varying degrees of complexity.

## Conditioning

A primary obligation of a leader is to be physically capable of fulfilling the requirements of the trip. This means that leaders must be fit enough to lead the trip, to enjoy the experience, and to have an adequate margin left over to cope with emergencies. The need for a margin may arise only rarely, but when it does, the leader must be able to deliver a clear-headed, physically active response.

For most Sierra Club outings, the principal physical requirement is endurance. The buildup of fitness requires well-ordered and regular work. One should start one's fitness buildup campaign very cautiously with a modest level of exertion and gradually expand to establish a training baseline that is adequate to support the workload level required on trips.

The key to fitness and endurance is aerobic exercise maintained for extended periods of time at elevated heart rates. A nominal training heart rate to shoot for is resting heart rate plus 75% of the difference between resting and maximum heart rate. The maximum heart rate is about 220 minus one's age. Any activity that permits the development of such rates for extended intervals will improve one's fitness, be it fast walking, jogging, bicycling, or swimming. Some activities may have more direct relevance to your Sierra Club activities than others, but all will help. The best practice is a regular and routine exercise that contains as many of the physical components of the trips to be led as possible. For climbs in the Sierra a preparation based on local hill climbing is ideal.

The best "conditioning" for hiking is hiking. Keep your body in condition to so the level of outings you want to do. Similarly, keep your mind fresh and attuned to the several things a leader needs to remember when leading a trip at any level.

## Planning the Trip

The first step is to decide where to go. Maybe it is a location that is new and enticing for the leader; or is a peak on a "list," or a series of lakes in a wilderness, or just a great vista point in the local mountains or a spot along the LA River. The goal is to plan a safe trip that will be attractive to participants.

## Research

With a general trip location and objective(s) in mind, the leader may get more information from the web, Google Earth, apps, guidebooks, newsletter write-ups, maps, and other leaders. Big picture maps and websites devoted to a geographic area can help with information about trailheads and provide a view of the overall terrain and adjacent areas.

### ***Consider These Factors and More***

- Trailhead parking, weather, time of year (amount of daylight). If a trailhead has limited parking, which the group size may exceed, the leader should have a plan for alternative parking arrangements. Some parking may require an Adventure Pass.
- Permits: leaders will need to know if permits are required.
- Pre-Planning Tools: The most important preparation for a successful trip occurs with the pre-trip planning phase that is extensively covered in Chapter 6: Navigation. Although focused more on I,M & E trips, many of the same principles apply to O trips, too. Several tools such a route card or a trip leg table are explained in the chapter.

- Scouting. The best information can come from scouting the trip since weather and participants can drastically change conditions. Scout (in full if possible) as near the scheduled outing as possible.

## Trip Planning for an O-Level Outing

O level hikes and backpacks call for trip planning that provides a safe and enjoyable experience for all and preserves the rating of the outing. Having a sound plan ensures that the leaders can accomplish the trip in the amount of time stated in the write-up, considers weather and local factors, and includes some conservation component where possible.

### A PLANNING CHECKLIST



*Just a few items of many that you may consider when planning a trip. A short day hike will differ from a longer one; a multi-day from a single day; and terrain, experience, time of year, weather – all will have an impact on your plans.*

- Directions to a rideshare location or the trailhead
- Trailhead parking and bathroom facilities
- Route and “legs” or sections of the route, e.g. trail junctions, turnouts, overlooks, etc.
- Spots for a “split break”, shade and clothing breaks
- weather and temperature
- snacks and lunch breaks
- trail conditions, e.g. reports after a storm, washouts, vegetation density and type
- known hazards and potential hazards, e.g. poison oak
- availability of water on the way (or at camp for a backpacking trip)
- Difficulty and elevation gain
- how long it will take - “Naismith Rule” can be used to estimate time to each point on a hike and how long it may take overall. Don’t rely on other people’s descriptions - some are notoriously understated.
- A solid plan also has a Plan B in mind. For an O-rated trip, you’ll want to have done research on alternate trails, and what to do in an emergency.
- Geology, Natural history and Land acknowledgements: what kind of trees, forest, desert or other land and plants will you see? Are the rocks brittle or abrasive? what is the history of the place you are hiking into? is it a place that indigenous peoples occupied and held sacred? is it a place that has a story to tell? Do the research and share with your participants.



## NAVIGATION BASICS FOR O LEVEL TRIPS

*The basic navigation skills needed for an “O” level trip are not as advanced as those needed for a trip that leaves the trail, you will want to use some basic navigation concepts when you plan and while you’re leading the trip. A map and a compass are part of the 10 Essentials for all “levels” of trips. See Chapter 6 for more details on navigation.*



### Planning Factors: Time, Distance Group Size

**How long will your hike take?** Figure out how long the trip should take at your pace and based on your expected group size. A general guideline is the “**Naismith Rule**” for on--trail hiking, which assumes the group hikes at 3 miles per hour (or 20 minutes per mile) on level ground.

It will take you longer if there is any elevation gain on the hike. The Naismith rule says that for every 1,000 feet of gain it will take you 30 minutes longer. A 6 mile round-trip hike with 1,000 feet of gain would take you 2.5 hours, based on this guideline.

**Group size** will impact all of the above estimates - a larger group takes longer to do anything (ie crossing a stream, regrouping after a rest stop or a split break). Add time in your plan for things like clothing breaks, rest stops, split breaks, and lunch.

**Route Considerations:** As you plan your trip, be aware of sunrise and sunset times, as well as the impact of cold/heat. Start your trip at a time that allows a margin of safety to return to the trailhead before dark. If you are hiking in the summer, consider the available shade, and perhaps a start time that avoids the heat of the day. In winter, be aware of the shorter daylight and possible cold/icy conditions early in the morning.

**Turnaround Time:** What is your “turnaround time”? That’s the deadline you establish that says “it doesn’t matter if we reach our original objective or not, in order to be safe (based on sunset, weather, etc) we are going to turn around at this time”.



### On the Outing

You should understand the basics of compass directions (north, south, east, west) and have a general sense of which direction the trail is going.

If you come to a fork in the trail that’s not clearly marked, you should be able to look at the map and have confidence that you know where you are, which fork you should take - and, once you do take that fork, that it is going in the direction it should be going. It’s not uncommon for there to be multiple trail junctions at one spot - and for hikers to end up taking the wrong trail, ending up miles from where they intended to be going!



### Basic Navigation Training

In addition to the material outlined in Chapter 6: Navigation, LTC periodically offers “Beginning Navigation Clinics”. They may be found on the LTC Calendar on the [LTC Home](#) page.

## **Campsite Selection for an Overnight Trip**

For overnight trips you need to consider campsites. Will you be camping in an established trail camp, or will you be looking for suitable tent sites along a lake or stream? You will need to become familiar with the camping rules for the area you are going into.

In some areas, bear boxes may be available at certain commonly used campsites, but don't count on them. Will there be enough space for the number of participants the leader is planning on accepting for the trip? If the group will use a campground, are group sites available, do you need to reserve in advance, what is the fee, and does the campground have water?

You may also form alternative plans should the group turn out to be faster or slower than expected. Consider nearby areas to explore if camp is reached early -- or a closer campsite if the group is not as fast as predicted.

- Keep in mind that most people are tired after eight to ten hours of hiking and you may need to set up camp in a different place, and earlier than planned.
- Follow LNT rules about picking an alternate camping site. See Chapter 2 for more on LNT.

## **Apply for Permits**

Permits are required mainly for overnight camping; but day-use permits are also required for hikes in wilderness areas in our local mountains such as San Geronimo, San Jacinto and Cucamonga. Ranger stations are the places to get these.

Applications for wilderness camping may be obtained from the US Forest Service or national park in which the trip will occur. Rules change from year to year, but head count limits are imposed in most areas. These are known as "Trailhead Quotas," and they do require serious planning ahead. Some permits are held back for walk-ups, but it is not a good idea to count on that availability for a group. Because some areas limit group sizes severely, you need to plan ahead and not wait too long to apply. Check forest and park websites - they usually can direct you where to find current information. For summer trips to the Sierra you may need to be ready to reserve a permit many months in advance. If permits are required, lack of one makes trip cancellation mandatory.

Some areas require only fire permits (check campfire restrictions), which also cover camping stoves. You can get your campfire permit online here: <http://www.preventwildfireca.org>

## **Submit a Write-up and Publicize the Outing**

As discussed more thoroughly in Chapter 1, all outings need to be approved by the outings chair of the sponsoring GSC and published first in Club outlets such as the online Schedule (usually submitted via Campfire Events) in order to be official Club outings. Once approved, the leader or outings chair can share the outing on social media. The write-up should include a realistic indication of how strenuous the trip will be for the average participant, as well as mileage, elevation gain, expected pace and duration, as well as give participants some idea about the "style" of the outing.

I-, M-, and E-level provisional leaders have additional levels of pre-review and signoff required to ensure their outings meet the technical requirements and safety elements of the trip before they are published. These include: Navigation review for provisional "I" leaders, and Provisional Lead Committee review / Mountaineering Oversight Committee approval for M and E level trips.

The write-up for a restricted outing should include the fact that only Sierra Club members may participate, unlike most other Sierra Club outings. *See Chapter 1 for more about the write-up and publication.*

### Screen Applicants and Select Participants



*See page 4 of this chapter for information about screening. The trip write-up and applicant screening should aim to assure that participants have the appropriate level of physical abilities, technical skills, and equipment. For outings that require a higher level of screening, leaders should request more recent detail from the applicant such as fitness and experience.*

### Scout the Trip

A leader should scout the trip whenever warranted by conditions or uncertainties. Private property restrictions, washed-out roads, and real estate developments may have changed the feasibility of a trip. Leaders of recent outings to the area may be helpful in supplementing the information gathered in the planning phase. And the Angeles Chapter website (see Chapter 2 for contacts and links) is an excellent source of current information on many HPS, DPS, and SPS peaks.

### Distribute an Information Sheet

For a trip that requires advance signups, the leader should distribute an information sheet (aka trip letter) with additional details or itinerary before the outing. For trips that do not require advance signups, participants will rely on details included in the initial outing write up. Leaders will reiterate the expectations and “plan for the day” at the trailhead or meeting point.

The information sheet should leave no doubt concerning distances to be traveled on trails and cross country, elevation gain/loss, steepness, anticipated hiking or climbing conditions, maps of the area, and equipment and special clothing requirements for each day of the trip. This information is especially important for overnight or multi-day trips.

To facilitate self-arranged carpooling, a list of participants with city and contact info should be included, but under the Sierra Club insurance policy the leader must **not** arrange the carpooling for participants. The sheet should include directions to the meeting place and indicate when participants are expected to be ready to begin the trip. The leader should send out the sheet at least a week before the trip and may request that participants confirm by a specified date or it will be assumed that they have canceled.



### Sign-up Etiquette

*“No shows” are a continuing problem for leaders who spend time planning an outing and ask for advance registration or attendance, or even spend money on permits or campsites. You may set up a “waitlist” and inform potential participants that, If spaces open up, you will fill them with participants on the list. It’s not uncommon to have multiple cancellations, so you may wish to ask potential participants to keep you advised regarding their availability and for participants to let you know immediately if they can’t make the outing.*

## Make an Emergency Management Plan

Leaders benefit from considering *in advance* what they would do in various situations when the harmony of the group has been disrupted or the trip goes awry. This applies to all levels of outings.

An emergency management plan is a safety management tool that lists the local resources a leader may need to call upon in the event of an emergency. The plan would indicate the nearest hospital and whom to contact in event of emergency, whether it be the sheriff, National Park Service, Forest Service, or Bureau of Land Management. The plan would include addresses and phone numbers as appropriate.

There is a Sierra Club form that can be used for this purpose called the Safety Plan. Found on the Forms page on the LTC site and under M/E Forms, this information can be useful to take with you -- and to share with your outings chair ahead of the trip. The Angeles Chapter does not require that a leader do this, though leaving the completed form with someone who will notice that the group has not returned is a good idea.

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## At the Meeting Place

### Leaders and Cancellation Policies

All trips require at least two appropriately rated leaders. If one of the designated leaders is not available, a rated participant may be appointed as an assistant leader. All assistants must meet the rating requirements that the trip difficulty specifies. See Chapter 3 for more on Safety Policies. If this cannot be done, then the route or objective must be modified to match the leader/assistant rating level. Should two appropriately rated leaders not be available, the trip must be canceled.

When a trip is cancelled for any reason, it may be rescheduled as an official Sierra Club trip even though a notice may not appear in a chapter publication. Outings Chairs should coordinate this with the leader.



**LTC recommends that “Cancelled” be added to the title of the event in Campfire; e.g. “CANCELLED O: Sandstone Peak Hike”- this helps the audience take note. A planned trip cancelled at the trailhead cannot be led as a “private trip” since it would still be recognized as a Sierra Club outing. Outings cancelled before participants leave home may become private outings.**

### Introductions: The Trailhead Talk

The leaders should identify themselves and have the participants introduce themselves. Explaining the expectations for the trip and that day and reviewing the rules of conduct, the leader should also point out any special permit restrictions and/or group restrictions. The talk basics consist of:

- Introductions, where we are and where we are going, turnarounds
- Breaks, lunch, timing, split breaks; place pack on trail if leaving group, or have a buddy system.
- stay between the leader and sweep, keep the group together
- inform leader privately of specialized medical training or medical considerations
- LNT, conservation, natural science, land acknowledgement components, history

***A more complete Trailhead Talk is available at the end of this chapter.***



## Signing-In

Participants must sign in to the trip using the approved Sierra Club form that combines a sign-in sheet with a release of liability. After the trip, the leader must send the sign-in sheet to the outings chair. Some leaders may select the e-waiver RSVP/Registration function in Campfire Events that allows participants to register and sign-in early. See the LTC website for more on Campfire Events. Leaders should be sure to check with their outings chair on whether this use is appropriate for their trip.

Leaders should mention in their write-up as well as at the trailhead that by signing in, participants are agreeing to obey the “Rules of Conduct” and have signed a liability waiver. “Restricted” Outings use a different version of the form.



“Camp followers” (persons who want to tag along without being officially signed into the trip) should be discouraged by every lawful means, including signing out any participant who appears to have encouraged their presence. *See Chapter 3 for rules on signing out.*

## The 10 Essentials and Trip-Specific Gear and Clothing



The “10 Essentials” are important for each participant to carry whatever the scope of the trip. The list covers items that cannot be improvised. Time is well spent at the trailhead to check that suitable footwear and clothing are being worn and that necessary items such as food, water, and camping gear are being carried. Participants in outdoor activities must be able to stay dry in order to keep warm, and backpackers must have additional items and equipment to stay dry in camp.

- Does everyone have the specified special equipment ready for use? For example, are crampons sized to the boots?
- Spare batteries for headlamps?
- Do participants have appropriate footwear for a segment of a trip that has repeated stream crossings to avoid time lost in changing in and out of boots with every crossing?
- What first aid supplies does each member of the group have besides the leaders’ first aid kits?
- How much water does everyone have?
- A leader’s essentials may be more than the usual ten.

## Conducting the Trip

### Start on Time

Having made a plan, the leader should try to stay with it. Starting early may provide a buffer of daylight for a long day’s outing. Trailhead introductions, signing-in, and equipment checks take time. For a large group on an O-level day hike, this process can involve delays waiting for stragglers, which the leaders should limit so that the group stays happy and starts together on a strong and positive note.

## **Car Caravans**

If the trip starts with a drive to the trailhead from some meeting spot, the caravan procedure, in which each car is responsible for visual contact with the car behind, should be used. If the car behind stops or is out of sight, the car in front stops. With a proper caravan a car will not be left behind, and problems can be taken care of more readily. Carpooling may be advised, arranged by the participants (the leaders may not arrange carpools). The leaders should know how many cars are in the caravan, and should keep track until they are all parked.

### ***Who Leads?***

Generally, the primary leader who organized the hike is the hike leader. Certainly on a provisional, the provisional leader is expected to take the lead throughout. But on some trips, leaders may designate their sweep / assistant leader to lead a portion of the trip, or arrange for another appropriately-rated leader to lead a section. (See leadership psychology earlier in this chapter.)

A leader who knows the route and is competent in navigation (if required) should precede the group. The other leader should be the “sweep,” moving with the end of the group. If the group starts to separate into a slow group following a fast group, the sweep leader may precede the slow group while at the same time retaining visual contact with them. This technique is especially helpful if there is some question as to the specific route to take. Because an “easy” pace in front may be much too fast for those in the rear, rotating the lead so that all leaders are sensitive to the physical condition of group members is a good idea.

## **Pace**

Setting a proper pace of travel will keep the group together. If the difference in arrival time between leader and sweep at a rest break exceeds fifteen minutes, it may be necessary to place additional restraints on faster participants, give additional encouragement to the slower participants, or both.

Once the group is underway, several key points should be followed to assure that everyone has the best chance of keeping up with the group and does not become “burned out” in the process. Starting off slowly for half a mile to a mile allows everyone’s respiratory and cardiovascular systems a chance to warm up to a comfortable steady state. By maintaining a steady pace at a rate the party can sustain, the group will probably fare best. After unusual obstacles (e.g., stream crossings or short sections of class 3) that tend to slow down each one in line, the leader should shorten steps until everyone has caught up.

## **Rest Periods**

Well-timed breaks can make the difference between agony and enjoyment. Most people will appreciate a clothing break after a few minutes of hiking. Well-timed “split” breaks and stops for water and/or rest will contribute to an enjoyable trip. During a rest stop, a leader may take time to discuss the elements of route finding and navigation or local environmental issues. A break is a good time for the leader to get to know participants better and monitor the group’s attitude and physical condition.

With an appropriate steady pace, the primary reasons for periodic rests (other than equipment changes or split breaks) are to decrease the level of lactic acid and other waste products in the blood, to take on fuel, and to re-hydrate. These can be accomplished with five to ten minutes of rest every hour. If a longer rest is requested, the leader should slow the pace instead. Stragglers who are too slow should be halted or turned back, if feasible.

Longer rest periods are not particularly advantageous because the fall-off in concentration of waste products decreases with time (recovery in twenty minutes is only about twice that in the first five minutes). Also, the movement equilibrium built up by the group is lost with longer rests.

After lunch, some time (about thirty minutes) should be allowed for digestion to get well along, because this process competes with exercise for the blood supply. If time is short, the lunch time should be reduced and it will be best to alert people to this so that everyone gets enough to eat and stay hydrated.

## **Keeping the Group Together**

Together does not mean in lock-step. It means in contact or being able to make contact in a short time. The main goal is to avoid losing people or more likely, having them lose the group, and to maintain communication ties verbally or visually. When the route being followed develops options, contact becomes particularly important. Counting heads after breaks or when gaps in the group have developed is a very sound practice. When in doubt, count!

Large diverse groups, trails with many junctions, routes with lots of stream crossings, and routes in heavy forest or brush can give the leaders some real challenges in keeping the group together or even maintaining a good appreciation of the group status. Groups tend to be easier to keep together going up (the front leader can wait) in contrast to going down. In fact, there is a peculiar tendency for large groups to spread out over the landscape during the last stages of trips proceeding cross-country across relatively flat terrain. For instance, once off the high ground and onto the wash-dissected undulating terrain on the return to a desert road head, participants making relatively small individual heading errors can build into a widely dispersed group front. Cars at the road head and other members of the far-flung party are often out of visual contact in spite of being fairly close together.

Although it is always good strategy to keep the group together, it is not always a simple process, especially as all are stumbling towards the end, believing they know what they are doing. A group that gets too separated can lead to long delays at the end of trips, and a major headache for those leaders who do not insist on keeping the group together until the cars are in plain sight of all. An intentional offset strategy is often helpful here (see Chapter 6: Navigation). Even more useful is a good GPS fix taken at the cars at the start of the hike.

One very important aspect to keeping the group together is being aware of the group's physical condition. Are participants starting to lag? Do they need to eat or have a water break? Leaders should monitor:

- Minor first aid issues such as blisters and sunburn
- Energy levels and Dehydration
- Cold problems: hypothermia and frostbite
- Heat problems: dehydration, heat exhaustion, heat stroke
- Altitude problems: acute mountain sickness, cerebral edema, pulmonary edema
- Tick attachment and other insect problems

## **In Camp**

When a backpacking group reaches camp, the leader often designates a kitchen site and eating area as well as bathroom, bathing, and swimming areas. The leader may wish to offer assistance as appropriate as participants set up their camps and fuss with stoves. During or after dinner, the leader should take time to talk about the next day's plan and objectives and discuss the day just completed. All food, trash, and scented items must be stored properly to avoid problems with animals before the group goes to bed.

## Trip Modifications

Conditions change, and the trip plan may have to change also. A good leader adjusts the objectives and route as needed due to weather, participant limitations, and other factors. This judgment decision, often with many options and tradeoffs, is even tougher because of the conflicting desires of participants. Trying to be reasonable, the leader must make safety the overriding consideration. Hiking in daylight is much safer than in the dark. If a safe alternative to the trip cannot be planned, the trip should be aborted.

## End of the Trip

The trip is not over until all members are accounted for. At the end of the outing, most leaders simply check that everyone is back; participants do not need to sign out unless they are leaving before the outing ends. The leaders should verify that all cars will start before they leave. After the trip, the leader sends the sign-in/waiver to the outings chair of the sponsoring GSC. If an incident has occurred requiring reporting, the leader should follow the directions on the report form. The leader should carry a copy of the form as part of emergency preparedness. Chapter 3 has more information on signing out procedures and forms..

Leaders may want to stay connected with happy participants. Future trips could have openings suitable for those on a prior trip and a hiker who is known and pleasant to be with can be a welcome addition. A leader also can demonstrate good guidance for participants on a backpacking trip by providing simple gear maintenance tips at the end -- such as thoroughly drying out and wiping off gear, clothes and boots. Tips and reminders about sharing photos are other ways to enhance the experience for all.

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# Hazards And Emergencies

Leaders must be constantly alert to potential hazards during the outing, e.g. steep banks, loose rocks, stream crossings, poison oak, and icy patches. How will these conditions affect the group's return? Will the conditions change from morning to afternoon? Good leaders stay aware of their surroundings and any situations that may affect the outing. **Chapter 5: First Aid outlines more details about injuries and illnesses.**

## Accidents and Emergencies

Because accidents and emergencies come in all shapes and sizes, careful risk management can help avert problems. The following section on outing hazards provides a survey of what can happen and what can be done about these problems. The leader should consider the following:

- Limit the emergency and render first aid as necessary
- Get outside help if one cannot handle the situation properly
- Complete the recovery and report the incident according to Incident Reporting Policies.

## Anticipate Possible Problems

A number of factors have the potential of creating an emergency situation, but for the most part, things can be done to prevent this occurrence. The leader's job is to predict possible emergency situations and take action to minimize the effect of "unavoidable" events. Some preparations may be useful, such as carrying pencil and paper, having a list of names and telephone numbers of rescue organizations in the outing area, and noting the location of phones and ranger stations.



## HAZARDS pt. 1

### **Use of Helmets**

Leaders and participants must wear climbing helmets on restricted mountaineering trips for ascending and descending 3rd class or higher rock when ropes are used and for snow travel when ice axes are necessary as well as in any area known or suspected to be dangerous due to rockfall.

### **Equipment Failures**

A thorough check of equipment before leaving the roadhead is certainly desirable, but a leader should be prepared for repairs. An emergency repair kit might contain a knife (Swiss Army type is versatile), wire, duct tape, safety pins, needle and thread, and extra hardware items such as crampon adjustment screws/nuts.

### **Rock Fall**

A significant number of chapter accidents result from a rock fall inadvertently started by another climber. Rock fall is a very common hazard, but one which is often controllable through group discipline. On high angle slopes, the leader can switchback so that climbers are never above one another. Where chutes are unavoidable, the leader can send one, two, or three climbers at a time in closely bunched groups. The leader can keep the area below a rappel clear of other climbers. Helmets are mandatory on climbs and hikes where rock fall potential exists. Again, the key to effective risk management is active leadership.

### **Snapping Branches**

In areas with high brush or trees with low branches, hikers should watch out for branches snapping back into them. Eye injuries are a real danger. The leader can remind participants to be considerate of others by not letting the branches swing back violently into those following and by not following too closely. It is illegal to trim branches and brush along trails without the consent of the agency responsible for the land being traveled.

### **Hiking Poles**

Many hikers like to use hiking (aka trekking) poles. The leaders should caution participants not to let poles point back at others as they go over rough terrain and to allow sufficient room between hikers to avoid injuries. When stowed on a pack, poles should not angle out but be snugged into the pack.

### **Earthquakes**

Earthquakes are not usually a problem to travelers unless they are near a rock slide or tall building. Unstable structures or loose hillsides may fall to the ground.

### **Stream Crossing**

Plan trips to avoid stream crossing at high run-off times, whether by season or time of day. When snow is melting, streams are at their lowest in the morning. Turn back if a safe place to cross cannot be found.

### **Rain**

Having the proper rain gear and a tent will minimize the effects of adverse weather. Provided the group is dressed adequately and packs are covered, it is still possible to enjoy a trip in rainy weather. Wet clothing and even a mild breeze, however, can have a very chilling effect. If an outing is conducted in rainy weather, the leader should be especially alert for signs of hypothermia. Rain may make travel on normally passable rock slabs treacherous. A continued rainfall lasting more than a few days can soak through all but the best tents, eventually leading to a wet sleeping bag. Unless means are devised to exclude moisture, it is time to retreat.

### **Snowfall**

An unexpected snowfall can make the landscape beautiful, but as everything becomes cold and wet, travel becomes far more difficult. Rain gear, extra clothing, and overmitts can protect from the cold, but travel may be reduced to a crawl. Caught in the wilderness, travelers may spend extra days returning to safety. Weather reports for the outing area as close as possible to the beginning of the outing may help the leader to avoid unpleasant surprises; a storm prediction may be cause to postpone or cancel the trip.

## HAZARDS pt. 2

### **Unexpected Snow Crossing and Ice**

If a detour around an unexpected snow patch is not feasible, a stick or sharp rock may be held in the snow as a third point of contact to aid balance as one crosses. The leader must consider how likely and how dangerous a fall may be. If the risks are high, the leader should get out the rope for a belay—if available and if the trip has been approved to use a rope—or turn around. Ice patches sometimes remain for months, even in the local mountains, after periods of warm weather. If ice must be crossed, extreme caution must be used. In the absence of a rope, it is probably time to abort the trip or a particular goal. See also Chapter 3: Safety.

### **Flood**

Flash floods are especially common in the desert. Even streams in local areas can change quickly from an easy step-across to a raging torrent. The group may have to make a detour to get out. The leader should be concerned when heavy weather conditions exist in hilly areas nearby.

### **Fire**

Brush fires and forest fires are fairly common and move quickly, easily trapping a group by advancing flames. Determining the best escape route, the leader should avoid rash action and assure that the group sticks together. Doing nothing, at least for a while, may be the best plan. In all cases, follow the orders of any fire personnel or police. A related concern can be the air quality from smoke - even if a fire is farther away.

### **Wind**

Strong, gusty winds make some kinds of terrain very treacherous. In wet conditions, wind chill can lead to hypothermia. Even in dry conditions, strong winds can severely chill the group and make progress difficult and even dangerous. In forested areas breaking branches or an occasional falling tree are hazards.

### **Lightning**

Especially when travel takes the group to high places, the leader must watch for sudden thunderstorms. Glowing metal objects, hair standing, and lightning striking close are exceptionally strong warnings that it is no time to be on a summit or ridge.

### **Bears**

Although grizzlies have long been absent from California, black bears do inhabit many of our mountain ranges. Wilderness permit information and websites will usually describe bear risk if any, as well as how to protect food. Hanging food is usually no longer a viable option as bears have become more clever at gaining access. Bear canisters (rentable) are the best solution and are required in many areas. Food loss and/or equipment destruction can be a serious matter for the victim and the bear, which may be killed for such behavior. Canisters also go a long way towards protecting food from other hungry critters. Check with the land management agency.

### **Insects**

Mosquitoes are a nuisance and may carry West Nile Virus, but bees and wasps can be deadly for those allergic to their stings. Those who are allergic should carry an EpiPen and inform the leaders of their allergy and location of the pen. Ticks may be carriers of Lyme disease; frequent checks for ticks on members of the group when travelling in areas where ticks are present help prevent their attachment.

### **Plants to Watch Out For**

In the desert, take care near cholla! and most spiny plants. Bushwacking in the mountains through manzanita can produce unpleasant scratches. But the one to be especially cautious about is poison oak: deceptively bare in the winter, it flourishes the rest of the year right where you want to take a split break or beside the trail. Check warnings about other noxious plants.

**Other Animals:** Mountain Lions and Bobcats are prominent fixtures of SoCal mountains especially where there are deer present, but they also roam throughout the rest of California and beyond. While P-22 is the celebrity cougar of Griffith Park, most mountain lions are less famous; they are solitary and shy of humans.





## Leadership and Safety Management

*In order to “explore, enjoy, and protect,” we lead groups to wild places on outings that we want to be safe, enjoyable, and environmentally responsible. Remaining aware of changing environmental conditions and the physical and mental condition of the group is key to conducting a safe outing.*

### Mental Aspect of Safety Management

- Fatigue—physical fatigue can dull mental awareness of risk and diminish concentration on the task at hand, such as descending a relatively easy slope and taking a misstep or misjudging the size of a rock in the trail and tripping
- Distractions—similar to fatigue in removing concentration from one’s movement over the terrain, such as looking back to respond in a conversation and then tripping over a root
- Over-confidence—over estimating the ability and experience of the individual or group, for example, assuming a group will move as quickly at the end of a long day as at the beginning or assuming that a roped team on a snow slope can arrest the slip of one member
- Complacency—for example, what the group climbed up with confidence may present challenges on the way down because of fatigue or awkward moves. What has been done before may present challenges in the current circumstance. Talus slopes can change in their stability as the slope changes.

Awareness of these factors—the leaders’ knowing and applying safety protocol and good judgment—is key to accident prevention. For example, leaders should remind participants on the descent that the climb is only half over and that they must stay focused on the climb. Monitoring the physical, emotional, and mental condition of the group is an essential aspect of good leadership and safety management.

### Examples of Keeping Safety Paramount. These examples apply to leaders and participants.

- Being in good condition to hike or climb safely
- Staying stable and completely in balance on and off the trail
- Monitoring changing environmental conditions
- Making sure all members of the group have appropriate and necessary clothing and gear
- Staying well hydrated and eating enough to keep up with the energy demands of the outing
- Carrying a first aid kit appropriate for the outing and level of first aid training.
- Reviewing first aid training prior to leading an outing
- Having a safety management plan for alerting rescue services if needed
- Periodically reviewing the lightning and altitude illness protocols.

### Leaders of M and E trips should also keep in mind:

- Keeping ice axe self-arrest skills well practiced
- Keeping away from exposure by anchoring oneself or staying well back from a cliff while waiting on a climb
- Not touching rocks above unless one is sure that the rocks are completely stable

These are just a few ideas of ways we consciously can make outings as safe as possible.

## Injury and Illness

Leaders should use first aid as appropriate. If altitude sickness is the problem, do not wait before deciding to descend. Caring for the sick and injured is far more important than reaching the objective or getting home on time. Generally, it is better to keep the whole group together until everyone is back to the starting point and able to proceed home. Morale can deteriorate rapidly if the leader excuses some participants and not others. Leaders of overnight trips especially will benefit from knowledge of Wilderness First Aid, but even an O-rated leader can use these skills in local mountains and deserts. *See Chapter 5.*



## Evacuation

Can the leaders and group handle the situation without outside help? Is evacuation the best solution? Options include carrying the victim and getting a horse or a helicopter. If the leader sends for help, the messengers should have adequate information—such as one of the two copies of the Emergency Response-Patient Report Form and one of the two copies of the Medical Form—concerning the injured person and location. The appropriate authorities should be notified immediately. The messengers should maintain contact with the authorities (stay by the phone) to provide additional help if needed. The other members of the group may help assure the best treatment possible and achieve the best rescue position.

## Personal Locator Beacons

Personal Locator Beacons, such as SPOT and InReach, are good to have when a true emergency arises that requires outside help. These devices, however, should not be used simply for convenience when the group can extricate itself from trouble or evacuate an ill or injured member without outside help. Like cell or satellite phones, personal locator beacons should be used responsibly. Good leadership—trip planning savvy, technical skills, experience, judgment, group and environmental awareness—may prevent an emergency.

## Helicopter Operations

### Landing Spots

One of the prime considerations for a helicopter pickup is a site with clearance for a landing (or at least a partial touchdown). The ideal situation is a flat, one hundred foot square. Fifteen by thirty feet, however, should be adequate. An exposed ridge is desirable to maximize approach and departure.

### Helicopters

Wind, elevation, and temperature affect the function of the helicopter. High elevations, temperatures, and winds reduce capabilities. Using dirt, snow, or light clothing to indicate wind direction will help the pilot. Safety on the ground is a prime concern. Staying at least 100 feet from the pad and staying in sight of the pilot, everyone should secure or move away all loose items (hats included).

### Evacuation Cost

Helicopter rescues can be expensive. Although some medical insurance policies will cover “emergency” expenses such as helicopter evacuation, the person being evacuated is generally responsible for payment. Service provided by the Army, Navy, or Marines is normally no-charge. The expense of a helicopter evacuation is a consideration, but obviously safety and well-being of the injured party are foremost concerns.

### Hoisting

If landing conditions are not suitable, a hoist operation may be required. If the rescue team cannot provide a person for ground support, the leader or other designated person must perform the required actions. A litter will be preceded by a tag line, which the leader will use to guide the litter down and up

## Misplaced Persons



*see also Chapter 3: Safety, section on Lost Persons.*

### **Form a Plan**

Even if the leader does everything right, some member of the group may become separated from the group - misplaced. If the leader has counted heads periodically, they can establish when and where the missing person was last included in the count. Questioning members of the group may improve on that information. Trying to reconstruct events helps in guiding ensuing actions. As in effective navigation, all the clues should be used to develop a search plan.

### **Yell and Listen**

If no immediate response to a yell comes, one should remember that many barriers block sound travel in mountainous terrain. Because good judgment will clear up most of these situations, the leader should keep the group controlled and patient.

### **Misplaced Leader**

If one of the leaders has become misplaced, the group should stay together and function as in the case of a misplaced non-leader. Sharing the problem may result in some valuable assistance.

### **Retreat**

Without a leader, the group may want to return to the starting point. It is hoped that people in the group walked with their eyes up and with some attention. Scouting may help as may a vantage point from a tree or a hill. The group should take time for navigation breaks, not rush, and stay calm.

### **Tracking**

Tracking can be used in cases of misplaced persons or in finding one's way, as retracing steps while returning from a peak climb. Avoiding obscuring the tracks that are available, one should try to follow step by step and use common sense as a guide to the route to follow. Broken branches and twigs and bent grass are other clues. One can practice tracking on any hike and then be ready to use it in a real situation.

## Bivouacs

### **Why and When**

Staying with the hiking/climbing game long enough, one almost certainly will bivouac. Sometimes people choose to bivouac even when a return to camp is possible. Accidents are an obvious consideration, but hazardous travel due to darkness or weather may also dictate a bivouac. A few hours of discomfort may be much preferred to a risky stream crossing or dangerous rock and/or snow travel.

### **Equipment**

Some basic equipment considerations can take the danger and much of the discomfort out of a bivouac. The standard "10 essentials," extra clothing, food, and water are vital. Assuming that someone may have to stay out overnight (and it might be the leader) either injured or otherwise, the leader should carry a down jacket or equivalent even though daytime weather is expected to be mild. A small, lightweight emergency tube tent can conserve an enormous amount of body heat and will fit in a first aid kit. Combining the above items with the other essentials will dictate the proper summit pack size. Outside straps will help with bulky clothing.

### **Be Prepared**

The obvious rule to follow is "be prepared."

# Emergency Response Check List and Trailhead Talk

## EMERGENCY RESPONSE PROCEDURES

### Scene Management:

1. STOP. Get calm and stay calm
2. Protect yourself and your group members
3. Establish primary leader and designate a first aid leader
4. Survey the scene (Is it safe? What happened? How many victims? Can bystanders help?)

### Patient Care/First Aid: (Stay within your level of training!)

1. Get consent to help the patient. (unconscious = consent)
2. Use protective barriers (gloves, breathing device)
3. Check the ABCs and address life-threatening problems
  - Airway: Is the patient's airway clear?
  - Breathing: Is the patient breathing?
  - Circulation: Is there life-threatening bleeding?
4. Do a secondary survey and record patient information (use the Patient Report Form as a guide)
5. Stabilize patient and scene before sending for help

### Develop an Evacuation Plan

(The Patient Report Form has an evacuation plan template on the back.)

- How are you going to safely get the patient help?
- Considerations: urgency, distance, terrain, group strength, route, communication devices.
- Write down the plan.
- If your group splits up, make sure each party has identical copies of the evacuation plan.

### Self-Evacuation (unaided by those outside your group)

- Never let anyone walk out unaccompanied.
- A leader should accompany the evacuation.
- A party of four or more is necessary for longer evacuations (longer than one hour).

### Sending a Messenger Team for Help

- Team size of four is ideal.
- Team should have necessary gear and food to be self-sufficient.
- Team should carry copies of the evacuation plan (see reverse) and patient report(s).
- The patient(s) and field group should stay in one place, so that a rescue team can find them.

### Who to Call

When your group can communicate with the outside world, do the following:

- **Frontcountry Emergencies (< one hour from help):**  
Contact the local Emergency Medical System (i.e., 911)
- **Backcountry Emergencies (> one hour from help):**  
Contact the local search-and-rescue [this info should be in your Safety Management Plan], as well as the E.M.S.

See the LRB for more Safety policies (Chapter 3) including about early signing out of participants.

**For all life-threatening emergencies or fatalities:  
As soon as possible, contact the Sierra Club Outing Department at:  
1-888-OUTINGS (1-888-688-4647) or  
001- 303-282-9914 if calling internationally.  
  
see incident reporting for more information.**

## TRAILHEAD TALK

This information should be reviewed before every Sierra Club outing. While some topics might require less detail on a short hike, it is important that each topic is covered. Leaders should be sure to have all the required forms and to carry with them on the outing, e.g. waivers, patent response, minor forms if applicable.

### 1. Welcome and Introductions

- Gather the group together and introduce the trip, yourself/other leaders
- Set a warm, welcoming and inclusive tone by acknowledging everyone.
- Ask participants to introduce themselves and where they are from
- Consider an ice-breaker question or “name game” for longer trips

### 2. Roles and Expectations

- Explain the leader's role and responsibility to the group
- Set or reaffirm the leader's expectations for the outing
- Ask participants for their expectations and concerns

### 3. Complete Paperwork and Sign Waivers

- Have all participants read and sign the liability waiver.
- Note that for trips that include an online RSVP in Campfire Events, you may just be taking attendance and adding those who show up at the trailhead.
- Make sure that you have medical authorization forms for all unaccompanied minors

### 4. Introduce the Conservation Message and Relevant Topics

- Introduce the issue you plan to discuss, materials you may hand out, etc.
- Environment and history of the area you are traveling in
- Land acknowledgements relating to the indigenous peoples who lived there previously.

### 5. Route Plan and Trail Conduct

- Describe the day's route and travel plan including turnaround time, breaks and lunch.
- Designate “leader and sweep” and set rules for group travel, staying between the trip leaders.
- Explain “Pack it in/Pack it out” and other Leave No Trace highlights that apply to your outing.

### 6. Safety Issues

- Explain what to do if one becomes separated from the group
- Describe the inherent risks involved in this activity
- Describe environmental risks the group might encounter
- Briefly describe your safety management plan
- Make sure all participants are comfortable with the risks
- Explain why hydration is important.

### 7. First Aid

- Each participant should have some first aid supplies as part of their 10 Essentials.
- Ask if anyone has medical issues that you should know about; if so, to let you or the assistant leader know in private
- Remind participants about foot and blister care – treat hot spots immediately

### 8. Equipment and Food

- Make sure that all participants have proper gear, food, clothing and the **10 Essentials**

### 9. Are you ready to go?

- Answer any last-minute questions, then go for it!

### Ending an Outing – before everyone goes home, make sure to take care of these details:

- Double check the sign-in sheet or trip roster to ensure all participants are accounted for.
- Distribute outing evaluations to all participants, if your entity uses them
- Invite non-members to join the Club (have brochures with you)
- Distribute any other Club materials you have, particularly ones related to your conservation message.
- Ask participants if it is okay for you and/or Sierra Club to contact them in the future. If not, make note of it on sign-in sheet!
- Make sure everyone has a way home and that their cars start before you leave.
- Thank them for their participation, and invite them to join a Sierra Club outing again



Onward to Chapter 5





# 5

## First Aid Considerations

*This chapter is not intended to supply First Aid instruction. It is an overview of options and explores the reasons why we expect leaders to have training in line with the level or rating of the trip. In this chapter you also will find an invaluable Wilderness First Aid assessment tool, a basic leader's first aid kit and more.*

Sierra Club leaders should be capable of responding appropriately to medical problems and injuries that may occur during outings that they lead. The leader's level of training should be appropriate to the environment and risks possibly encountered on a given trip. For example, leaders for outings that occur in or near an urban environment require a lesser level of training than those occurring in more remote settings where professional medical care is more than one hour away.

Although O-level candidates need only a standard first aid course and adult cardiopulmonary resuscitation (CPR), all other candidates must complete a twenty-four hour or longer wilderness first aid course as well as adult CPR, as noted in chapter 1. Those O leaders, however, who plan to lead backpacks or other trips more than an hour distant from emergency medical services are strongly encouraged to study wilderness first aid also.

If an I- or M-rated leader later completes the additional requirements to become an M or E, they must have current certification in wilderness first aid (twenty-four hour minimum) and CPR or will need to repeat these requirements so as to be current at the time the new leadership level is attained. First aid, wilderness first aid, and CPR are considered current prior to the provider's stated expiration date on the card, typically two years for FA and CPR and 16-hour WFA and three years for WFA.

Please note that for restricted M-and all E-level outings, one of the two leaders must be current in wilderness first aid (sixteen hour minimum course such as NOLS/REI); the other leader may be current in standard first aid. Thus, a certified, not provisional, M or E leader may take a sixteen-hour wilderness first aid course to stay current.

## **Comparison: Basic First Aid and Wilderness First Aid**

In an urban setting or within the reach of an emergency call (e.g. 911), First Aid is rendered under the assumption that the patient will enter the emergency medical system rapidly.

In the wilderness—essentially any location more than an hour away from professional medical care—basic (or “Standard”) first aid is of limited use for a variety of reasons. For one, the care required may be beyond the scope of basic first aid.

Because of a lack of specific medical equipment and trained medical personnel to care for the victim optimally, the standard of care may deviate in the wilderness from that of urban medical care, and rescuers may have to improvise equipment and technique or do without. Some illnesses and injuries are unique to an outdoor or wilderness environment, such as snakebite or acute mountain sickness. Due to remoteness, lack of communication, and lack of transportation, professional medical care is likely to be delayed for hours or days when injury or illness strikes in the wilderness. As a result, the rescuer’s contact with the patient will be prolonged for hours or days and will be around the clock; the rescuer thus needs training in longer-term care.

The outdoor environment itself can present a challenge to the victims and rescuers alike, who may be exposed to unfavorable temperatures, weather, altitude, and terrain and a lack of food, water, and shelter. To make appropriate evacuation decisions, a leader needs familiarity with rescue techniques and operations. Finally, outcomes of treatment in a wilderness setting may be less favorable than treatment obtained by rapid entry into the emergency medical system.

## **Staying Current and Expiration of Certification**

A leader must be current in a qualifying first aid course when leading an outing. The expiration date for all first aid classes will be the date on the card.

- LTC Admin enters the certifications for leader candidates.
- Outings chairs usually update these certifications for rated leaders and must abide by the expiration standard. Leaders should share a photocopy of the card that shows the date. Note that the Club no longer automatically recognizes a four-year expiration for first aid; now it is determined by the expiration date on the card.
- Refreshing standard first aid: leaders may do an online course only every other time they are renewing the certification.
- CPR does not satisfy the First Aid requirement! CPR is required of leader candidates and in certain entities' policies (such as WTC or ICO).

### ***New Leader Candidates!***

Be sure you take both FA and CPR to include in your requirements to be a Provisional Leader. There are several types of FA that qualify: Basic (or Standard) FA, FA+CPR (wherein FA is the primary part), Advanced FA, First Responder, WFA, WFR, Wilderness EMT, Medical Professional, etc.

- ✎ **candidates:** Standard (Basic) First Aid and CPR.
  - (At this level, a 16-hour WFA course is counted as Standard FA.)
- ✎ **I candidates:** 24+ hour WFA (or higher) course and CPR.
  - (16-hour WFA is only allowed as a refresher, not first time.)
- ✎ **Advanced Ratings:** same as I.



*Already a Leader? Refreshing Basic First Aid, or FA + CPR? See the LTC website First Aid Page.*

### Other Considerations

- A physician, nurse, or other currently practicing medical professional need not take a basic first aid course if they have first aid knowledge equivalent to or higher than American Red Cross Basic. For the I or higher rating, WFA may be required.
  - Medical professionals: you may need to send us your card so that we can record the information and dates. If you are going for an I or above, you also may want to consult with [Steve Schuster](#), LTC First Aid Chair on your WFA needs.
- Certain entities such as ICO may have their own requirements. Contact the outings chair.

### Wilderness First Aid

I/M/E candidates must take and be current in 24+hour WFA or higher + CPR

- To refresh / stay current, I/M/E rated leaders may take a 16-hour refresher unless they are going for a higher rating at which point they must be current in 24-hour or higher.
- There is no such thing as a "grace period" during which you may be considered certified after expiration date; if a course has that language, it means that you may have a period of time during which you can recertify without starting over.
- For M-restricted and E level outings, one of the two leaders must be current in WFA (16-hour minimum); the other current in (at least) Standard FA.
- If an I or M leader wishes to advance their rating, they must be current in a 24-hour or above WFA + CPR.
- Wilderness Travel Course (WTC) has its own WFA/CPR policy that applies to group leaders.
- Currency is based on the expiration date of the card.
- No online courses are accepted for WFA refreshing.
- We always recommend the 24+hour courses for the most depth of information.

## Choosing a First Aid Course

Taking sixteen to twenty-four or more hours of wilderness first aid (WFA) instruction is generally inconvenient. Most commercial WFA courses are expensive, and twenty-four hours of first aid may be out of proportion with a leader's training in other equally important disciplines, e.g., map and compass. Because first aid is a safety skill rather than a primary skill like recognizing trees and flowers, a leader will not necessarily have a more fulfilling trip just because first aid training.

Nevertheless, a person cannot become adequately trained in wilderness first aid in three to four hours any more than one can learn to skydive or pilot a small plane in the same period of time. Leaders who want the peace of mind that comes with being adequately prepared to deal with medical emergencies in the wilderness will have to invest the time and money.

This is not really a discussion about wilderness vs urban first aid courses; it is a discussion about getting enough hours of quality instruction. To provide a specific example, the eighty- to one-hundred-hour Emergency Medical Technician course is urban first aid, but it is quality first aid instruction that will prepare a person to deal with 98% of the illnesses and injuries you will encounter in the wilderness. That is not meant as a recommendation that every wilderness leader get an EMT certificate.

Red Cross Standard First Aid (RCSFA), the most popular three to four hour first aid course, spends most of its time cataloguing injuries and illnesses and listing their signs and symptoms. It is very weak on patient assessment. Taking it is roughly equivalent to passing the written driver's license exam without any time behind the wheel of a car and then expecting to be a competent driver.

Advanced electronics are no substitute for first aid skills. If a party of backpackers in the Sierra uses a SPOT emergency locator beacon or a satellite phone to request help for a life-threatening emergency, a typical response time (from call to helicopter arrival) is five to six hours if the call is made early in the day and ten to twelve hours if it is made late in the day. At best, RCSFA training will prepare a leader to deal competently with the first fifteen to thirty minutes of that period. The time between that first half hour for which a person has been trained and the arrival of professional medical assistance is going to seem like several lifetimes if the leader has a seriously ill or injured patient and no idea what to do for him or her.

Realistic simulations are the heart of any quality first aid course, wilderness or not. Before signing up for a first aid course longer than three or four hours, ask how much time is spent in simulations. Find out how long a single simulation runs (just doing a realistic assessment of a patient takes a beginning first aider fifteen minutes or more), how many "rescuers" are assigned to one patient, and what fraction of their time the instructor(s) can devote to each group doing a simulation.

### **Instructor Qualifications**

First aid is like most other disciplines—if a person has not done the real thing out "in the field," they most likely do not understand it well enough to do a quality job of teaching it. Many short first aid courses offered by the Red Cross and similar providers are taught by paramedics, nurses, and other experienced health care professionals, but not all first aid instructors are that well qualified. Ask about the instructor's hands-on patient care experience before signing up for the course.

### **Recognition of Course Credentials**

If a leader wishes to go beyond a three- to four-hour first aid course and/or wishes to take wilderness first aid, a number of regional and national organizations may offer appropriate first aid courses. All of them most likely provide a diploma or certificate of course completion. If a person is taking the course as part of leadership training for one or more organizations, they should find out in advance which first aid courses are recognized by the organizations one is training to lead for.

National organizations such as Wilderness Medical Associates (WMA) are likely to be recognized by most or all organizations requiring first aid training for their leaders; regional organizations such as the Wilderness First Aid Course (WFAC) may not be recognized outside their geographic areas. The American Camping Association maintains a list of widely recognized Wilderness First Aid providers.

## Legal Considerations

### Obligation To Render Aid

No state in the United States has laws that require anyone to help a stranger in distress. An obligation does exist in such circumstances, but the obligation is ethical, not legal. A legal obligation to render first aid and assistance (“duty to the patient”) does exist when one has caused injury to another. This obligation exists for leaders of organized outings, and probably also for fellow members of a hike, backpacking trip, or technical climb.

If a citizen does go to another person’s aid, the law obliges them to continue to care for the patient until the patient’s care is transferred to another qualified person. Failure to do the latter is called abandonment and can result in consequences such as a lawsuit.

### Documentation

Detailed documentation of the emergency care provided to each patient is very important: this documentation is required by most rescue organizations, which provide report forms to be filled out in each case. The rescuer should remember that, in the case of litigation, he or she may be required to testify in court many months or years after the occurrence in question. Having a complete and accurate report to refer to is much better than relying on memory alone.

Once a first aider has touched a patient and started to give care, he or she cannot just walk away, even if the patient momentarily changes his or her mind or starts imposing conditions that make it difficult to give appropriate first aid. The patient may decide to refuse further treatment or insist on being released to the care of someone less qualified or impose conditions (e.g., “I want your help, but you can’t remove my clothing”). In such a case, the rescuer should attempt to persuade the patient to accept the suggested care, by making these things clear:

- 1) why this is in the patient’s best interest, and
- 2) that the rescuer’s training requires them to proceed in this manner.

If the patient still refuses to allow the rescuer to perform first aid in a manner that the first aider thinks appropriate, the rescuer should ask the patient to sign a *Refusal of First Aid* form, an example of which is found on the LTC website under “Forms” and “First Aid.” The form provides a degree of legal protection for the rescuer if first aid is discontinued. Before asking the patient to sign this or any other form, one must make sure they are conscious, alert, and fully oriented and not under the influence of alcohol or drugs. If the patient refuses to sign the form, one should note all the information on the form anyway, note that the patient refused to sign, and have witnesses sign.

## **Informed/Implied Consent**

In the eyes of the law, a person's body is inviolate. Interfering with it or even touching it without permission may constitute battery, an illegal act in many states. Because any person usually has a right to refuse emergency care, when first approaching a patient, the rescuer should identify themselves as a trained rescuer and provider of emergency care and ask "Can I be of help?"

The patient may either specifically give consent or may cooperate with your assessment and care in a way that can be taken as actual consent. When telling patients what they need to know about the treatment being offered, the first aider should make sure to do it in language the patient can understand. Not only will this satisfy the requirements of informed consent, but it will also provide patients with greater confidence since they know what to expect.

If the patient is unconscious or irrational or is a minor and urgently needs care for a life-threatening or serious illness or injury, consent may be "implied." This means that the law presumes that the patient, if able (or the patient's parents or guardian, if present), would consent to the care.

In some cases, a patient who initially refuses care can be persuaded to accept help by a calm discussion of the risks of not obtaining care. If the patient persists in refusing, it is wise to have responsible witnesses present and have statements from them for the record specifying that care was offered and refused.

If an irrational or unreasonable patient refuses urgently needed care for a life-threatening or very serious condition, it is probably better at least to try to give the care despite the refusal. At this point, however, proper documentation is essential.

## **"Good Samaritan" Laws**

Another deterrent against litigation is the so-called Good Samaritan laws, the purpose of which is to encourage people to help out voluntarily in emergencies. Although these laws do not prevent suits from being filed, they generally make it more difficult for the plaintiff to win because in theory they absolve from liability anyone covered by the statute who gives care gratuitously, in good faith, and in accordance with his or her training and expertise in a bona fide emergency—except in the case of gross or willful negligence.

California Health and Safety Code 1799.102 adds that no person who in good faith and not for compensation renders emergency care at the scene of an emergency shall be liable for any civil damages resulting from any act or omission. (Four other California good Samaritan laws add very little to this basic one.)

Federal Volunteer Protection Act (1997) protects volunteer members of non-profit organizations who are acting within the scope of their responsibilities. Unlike the California Good Samaritan laws, the Federal statute is not limited to medical situations. It protects a wide range of volunteer activities such as coaching Little League, being a Girl Scout leader, and leading a wilderness outing for the Sierra Club. Despite any legal protection offered by the above state laws, the rescuer should realize that the best protection—and also an ethical obligation—is good, up-to-date training, conscientious maintenance of competency in knowledge and skills, and dedicated patient care.

Nonetheless, training and quality care alone are not sufficient legally unless records are kept that document them, preferably on standardized forms. Detailed notes should be made of dates, names of rescuers attending, and procedures performed. Although a legal basis for claims does exist, lawsuits arising from voluntary medical assistance are very rare. In wilderness circles they are essentially non-existent.



**Note:** This information is for general guidance only. An attorney should be consulted for definitive legal advice.

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## RECOGNIZING HYPOTHERMIA AND HEAT PROBLEMS

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### Mild Hypothermia

1. Victim feels cold
2. Victim shivers uncontrollably
3. Victim loses fine motor (hand) coordination
4. Victim is lethargic/tired/apathetic/forgetful
5. Victim feels weak
6. Victim moves at a slow pace
7. Victim stumbles

### Profound Hypothermia

1. Slow thinking process (decision making is difficult often erroneous)
2. Retrograde amnesia (memory of specific facts, dates, and names deteriorates)
3. Strong desire to escape the cold by sleeping
4. Apathetic (especially towards survival)
5. Periodically lapses into coma
6. Speech is incoherent (this is a late sign)
7. Loses vision (another late sign)
8. Has acetone-like, fruity breath (poor fat metabolism from inadequate blood supply)
9. Shivering is decreased or absent
10. Expresses a willingness to cooperate but does not do so
11. Skin is cold, pale to blue in color
12. Pulse is weak, slow, irregular
13. Respirations are slow, shallow, irregular
14. Urinary incontinence
15. Denial that anything is wrong

### Heat Cramps

1. Severe muscle cramps
2. Weakness, exhaustion, clammy skin, fast pulse, profuse sweating, anxiety, nausea, restlessness
3. Normal or slightly elevated body temperature

### Heat Exhaustion

1. Thirst, weakness, nausea, confusion, cool and clammy skin, fast pulse (above 90/min), rapid and shallow breathing, profuse sweating, anxiety, restlessness (seems like shock)
2. Person may faint
3. Normal or slightly elevated body temperature, below 105°F
4. Decreased urine output

### Heat Stroke

1. Skin is hot and flushed
2. Altered level of consciousness
3. The person may still be sweating, or sweating may have stopped
4. Pulse is rapid and strong, becoming weak later on
5. The person may be confused, weak, or dizzy and be complaining of headache and being very hot
6. Temperature is usually above 105°F
7. Nausea, vomiting, diarrhea, agitation, delirium, coma, seizures

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## Wilderness First Aid Response

# RESPONDING TO WILDERNESS ACCIDENTS AND ILLNESS



*This material is designed for use as part of a course of instruction, including hands-on skills practice under the supervision of qualified instructors. It is provided here to promote a general understanding of wilderness first aid.*

### Scene Survey

- Form a general impression of the nature of the accident and the victim's injuries.
- Look around for objective danger—anything that can put you or your patient(s) at risk such as falling rock.
- Put on medical gloves and get out your barrier for mouth-to-mouth breathing if you may need it.
- Count the number of victims.

### **Primary Survey**

- Assuming that there is only one victim,
- Assess Airway—is the patient able to respond verbally? Open airway with modified jaw thrust as needed.
- Assess Breathing—can the patient use basic (complete) sentences? Give mouth-to-mouth breathing if needed.
- Assess Circulation—does the patient have a pulse? If the patient meets A & B above, the answer is yes. Otherwise, check for the carotid pulse.
- Assess Bleeding—is there visible fresh blood on the patient's skin, clothing, or the ground nearby? If so, expose the source by removing clothing. If the bleeding is profuse, control the bleeding with direct pressure right over the source of the bleeding. If the bleeding is minor, place a piece of gauze over the wound and secure it if needed.
- Immobilize the patient's head and neck. Use c-spine immobilization techniques if you are trained in them. Otherwise, ask the patient to look straight ahead, to keep his or her head and neck absolutely still, and not to look around.

### **Gather Patient Information**

- Introduce yourself and state your qualifications in first aid.
- Ask the patient's name.
- Estimate the patient's age. If the patient is in their teens or twenties, ask for age.
- Assess patient Level of Consciousness (LOC) as Alert/Verbally Responsive/Responsive to Pain/Unresponsive

### **Get permission to treat**

- If the patient is alert, further assess LOC. Can the patient correctly identify:
  - Person—who is he or she?
  - Place—where is he or she?
  - Time—what day of the week and what month is it?
  - Situation—what happened?

### **Address the Patient's Chief Complaint**

Ask the patient "What hurts?" The answer to this question is referred to as the patient's "chief complaint." Expose the site where the complaint is located. Assuming that what you find is not life-threatening or potentially disabling, spend a minute or two addressing it. If it is a wound, put a dressing over it. If it is a possible fracture, have someone immobilize it. If it is a bruise, elevate it and apply ice or compression. Talk to the patient about it and express your concern, but move on as quickly as possible.

### **Get Vital Signs and Record Them**

- Pulse rate and quality, e.g., 88 per minute and weak



- Breathing rate and quality, e.g., 16 per minute and shallow. Breathing rate can be difficult to assess through outdoor clothing. If breathing is not labored or noisy, you can record it as “normal.”
- Skin vitals are color, temperature, and moisture, for example “pink, warm, and dry.”
- Check Pupils—assuming the patient is outdoors in daylight, ask the patient to close his or her eyes and cover them with your hand. Count to ten. Have the patient open his or her eyes as you remove your hand. Do both pupils constrict (get smaller)? Are they equal in size?
- Record vital signs including level of consciousness along with the time.
- Vital signs should be repeated every fifteen minutes until the patient’s condition is stable.



### Medical History

- Ask the patient about the following aspects of his or her medical history:
- Allergies—does the patient have any allergies, if so, to what?
- Medications—ask the patient to list his or her current medications. Since it is easy to record the drug names incorrectly, make sure to record the function, e.g., drug for hypertension.
- Previous Medical or Surgical History—ask the patient whether he or she has had illnesses, operations, or chronic conditions that might be relevant to the current situation.
- Last Meal—when did the patient eat last and what/how much? When did the patient drink last and what/how much?
- Events Preceding—what happened just before the accident or the onset of the illness? For example, if the patient fell down and injured his wrist in the fall, did he fall because he wasn’t watching his footing or because he felt dizzy? If the latter, the first aider must ask additional questions to determine whether an underlying medical condition caused the dizziness.

### Head-to-Toe Exam

- Begin at the head and work toward the feet but save the back for last.
- Check the head for lumps, bruises and wounds. Check the nose, ears, cheekbones and mouth for blood or discharge. Have the patient bite down; Ask “does this hurt?” Check the vertebra of the neck by pressing on each one and wiggling it gently:
- Is it displaced compared to its neighbors?
- Does it move?
- Does pressing on it cause the patient pain?

Check both collarbones for pain and deformity. Ask the patient to inhale while you squeeze both sides of the ribcage. Does this hurt the patient? Find the belly button and draw imaginary vertical and horizontal lines through it, dividing the stomach and abdomen into four sectors. Press firmly on each sector using both hands with the fingers overlapped. Does this cause pain? Are the muscles rigid? Find the points of the pelvis and put one palm on each. Push down, compressing the pelvis against the ground. Does this hurt the patient?

Wrap your hands around each leg, one at a time. Run your hands down the leg, beginning just below the groin, squeezing while trying to touch as much surface area as possible. Are there deformities? Does this hurt the patient? Do you feel any fresh blood? On each leg, remove the shoe and sock. Do the following four checks on each foot:

- **Circulation**—Pinch the big toe, observe that the nail bed has gone pale, release it and time how long it takes the nail bed to go pink again. The time should be two seconds or less.
- **Sensation**—With the foot in a location where the patient cannot see the toes, pinch the big or little toe and ask the patient which toe you are pinching.

- **Motion**—ask the patient to wiggle his or her toes.
- **Function**—with your hands, push up (toward the patient’s head) on both of the patient’s feet and ask them to resist. Then pull down (away from the patient’s head) on their feet and ask them to resist. Can the patient exert a normal amount of force with their feet, and is the force roughly equal on both feet?

Put the patient’s socks and shoes back on and move up to his or her arms. Wrap your hands around each arm, beginning just below the armpit, one at a time. Run your hands down the arm, squeezing while trying to touch as much surface area as possible. Are there deformities? Does this hurt the patient? Do you feel any fresh blood? On each hand, remove gloves or mittens. Do the following four checks on each arm:

- **Circulation**—Pinch the thumb, observe that the nailbed has gone pale, release it, and time how long it takes the nail bed to go pink again. The time should be two seconds or briefer. This is referred to as checking distal circulation or “distals.”
- **Sensation**—With the hand in a location where the patient cannot see the fingers, pinch the thumb or little finger and ask the patient which finger you are pinching.
- **Motion**—Ask the patient to wiggle his or her fingers.
- **Function**—Offer the patient your index and middle finger on each hand and ask the patient to squeeze them hard. Can the patient exert a normal amount of force with his or her grip, and is the force roughly equal using both hands?

**Check the back.** Lift the patient’s near shoulder and reach under him or her with the other hand until you can feel the spine. Starting with the prominent vertebra at the base of the neck (C7), place your fingertips on the bony protrusion of each vertebra, one at a time, and press gently. Is it aligned with its neighbors? Wiggle it a bit—does it move more than its neighbors? Watch the patient—does it look like he or she is experiencing pain when you move the vertebra?

### **Dress Wounds and Splint Possible Fractures**

- ⇒ Wounds found during patient assessment that were bleeding heavily have had the bleeding controlled with direct pressure over several pieces of gauze. At this time (if it has not already been done), the dressing is checked to confirm that bleeding has stopped, a bandage is wrapped tightly to hold the dressing in place, and distal circulation on the affected limb is checked.
- ⇒ Wounds found during patient assessment that are not bleeding heavily have been temporarily dressed with a piece of gauze. At this time they are cleaned with soap and water, dried, and redressed, and a bandage is applied to secure the dressing.
- ⇒ Possible fractures found during patient assessment have been stabilized by a first aider holding the limb above and below the injury site. At this time the materials required for splinting are assembled. With the first aider continuing to support the fracture site, the splint is applied and secured. Distal circulation is then checked on the affected limb.

### **Reposition the Patient (this can be done at any time during the response)**

Sometimes the patient needs to be moved a short distance to be relocated away from the trail or to be sheltered behind a boulder from wind or rockfall. In addition, patient body position sometimes needs to be adjusted to be more appropriate for the patient’s medical issues. For example, a patient who has lost

significant blood is likely to do better lying down than sitting up. The following is a list of body positions and the medical conditions with which they are usually helpful. Keep in mind that the patient's "position of comfort" trumps these general guidelines.

If the patient says that breathing while lying down is difficult, then allow him or her to recline or sit up.

Also consider what sort of injury or illness is likely to cause this symptom.

- Shock or loss of blood—Lying down with head slightly downhill
- Head injury—Lying down with head slightly uphill
- Bleeding from the mouth or likely to vomit—On his or her side
- Difficulty breathing—reclining
- Chest or rib injury—sitting up with uninjured side higher

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## Emergencies / Patient Report Form User Guide



*See Chapter 4: Leadership section on emergency procedures and evacuation. See also Chapter 3: Safety regarding incident reporting.*

A leader's packet of paperwork taken on an outing includes the Incident Report form, waivers along with an Emergency Response-Patient Report form. These forms are all available on the LTC website. The Patient Report form is self-explanatory. Ideally, the leader or designated individual fills this out.

### **Emergency Response – Patient Report (ERPR) Form User's Guide**

✎ **Mechanism of Injury:** *A description of the physical circumstances of the accident, e.g., "The patient fell backwards and struck his head."*

✎ **Chief Complaint:** *What the patient tells you when asked "what hurts?"*

✎ **Cleared C-spine:** *Answer "XT" (see Note below) unless you have taken 16 hours or more of wilderness first aid and are trained in this assessment.*

✎ **Disability (c-spine):** *Immobilize c-spine if you are trained to do so. Otherwise, tell patient to lie still and not move head or neck.*

✎ **Release Spinal Precautions:** *See "Cleared C-spine" above.*

✎ **Neurological Exam:**

- *Memory test: give the patient a number or color to remember and ask 5 minutes later what it is.*
- *Orientation: Who are you? Where are you? When is it? What is your situation?*
- *Pupils: Are they equal, round, and reactive to light?*
- *Sensation: can patient tell you when you pinch his little or big toe (making sure he can't see what you are doing)?*

✎ **Strength**—*can patient squeeze your hands with both of theirs using appropriate strength? Can patient push up/down/in/out against your hands using their feet with appropriate strength?*

**Note:** *Keep in mind that this form with your answers could become a legal document. If you do not understand a term on the form or you are not trained in the assessment required, write "XT." Then on the bottom margin, write "XT—exceeds training."*

## WHEN A TRIP MEMBER IS INJURED: BEDSIDE MANNER AND THE OUTING LEADER

By John Edginton

As Former Chair of the Sierra Club's insurance committee, I am often called upon to explain why the Sierra Club has enjoyed an excellent loss history with regard to accidents on both national and chapter outings. A number of factors contribute to our successful record: good safety practices on outings, the reluctance of loyal and/or sympathetic members to sue the club, a realization that the participant is often at fault for the injury, and fate.

But there is another factor at work here which prevents claims, one that I think is as important as any of the others: the good "bedside manner" of our outings leaders toward a trip member who is injured.

It goes without saying that we should operate our outings and activities as safely and cautiously as possible, consistent with the goals and nature of the activity. We need to reinforce good leader traits and skills with training and create opportunities for leaders to network and discuss their experiences, problems, and solutions. We should also encourage fellowship among our participants so that their loyalty and restrained litigiousness continues. But as we do all of that, we should also be sure that this other important skill is in our repertoire.

The expression "bedside manner" is commonly used in reference to a medical practitioner. A physician with excellent bedside manner conveys confidence and concern in caring for his/her patient, regardless of the stress involved. Likewise, an outing leader should exhibit confidence and concern toward an injured participant, not only as a common courtesy but also for the purpose of preventing claims.

Techniques like bedside manner are part of the "soft" side of leadership—namely people-to-people skills. All leaders have different personalities and will approach each situation differently. The following tips, however, should prove useful to everyone.

### Do:

- Stay calm. When an accident occurs, a good leader will approach the situation as calmly and efficiently as possible. The expertise and training in first aid/mountain medicine skills will be apparent, which will be comforting to the injured participant. If the leader is calm and logical, the victim will have a feeling that the situation is in hand, and in good hands. The moral here is to have the appropriate amount of first aid/mountaineering skills necessary for the trip you are leading. This will allow a confident and quiet approach.
  - Pay attention to the injured person. In addition to being calm, the leader must present an empathetic/sympathetic personality. The use of calming words and a concern for the injured person's comfort and mental well-being are mandatory. Generally speaking, you should not leave the victim alone. Explain the details of what is being done and describe any evacuation procedures or other measures you are taking to summon help. Assure the patient that their gear will be taken care of if they will be evacuated.
  - Remember the relatives. It is also important to be considerate of any relatives or friends of the patient who may be present and to keep them informed about what is going on.
  - Keep written records. Keep a written log regarding the injury and treatment so that this can accompany the patient if an evacuation is necessary. The doctors at the medical facility will be

grateful for this information, and it also will be helpful when preparing the incident report. Also be sure to send along any information you have regarding allergies or other medical needs that you received from the trip participant prior to the outing. If you didn't get this information ahead of time, get as many details as you can from the injured person afterwards.

- Send someone out with the injured person. Unless the victim is evacuated by professionals, be sure the person is accompanied to the final destination for treatment by a member of the trip staff or responsible volunteer. As leader you have a responsibility toward the other participants to continue the trip, assuming the welfare of the injured person can be taken care of in some reasonable way.
- Maintain communication after the trip. If the participant has been evacuated and is in a hospital, visit him/her at the end of the trip and offer assistance if possible. Be sure that diligent attempts have been made to contact the participant's relatives or friends who will assume responsibility after your departure. Upon returning home, remain in contact with the injured participant, so that he or she understands that you care about his/her welfare and recovery. These final steps are very important.

**Don't:**

- Don't volunteer opinions regarding the cause of the accident to the patient or anyone else. Complete the accident report and transmit it in accordance with its instructions. During World War II it was said that "loose lips sink ships," and the same is true with claims prevention. Do not make statements, which later could be deemed admissions against the Sierra Club's interest.
- Don't cancel the outing if it reasonably can be continued in light of the accident. You do have a responsibility to the other trip members to fulfill their expectations.
- Don't attempt medical procedures or treatment that is beyond your expertise. Some procedures should only be performed by a nurse or doctor. Do utilize any medical expertise or training which may be present among the trip members.
- Don't expose yourself to the risk of a claim of sexual harassment. When working on a member of the opposite sex, try to have a witness of the patient's sex to avoid claims of improper touching, etc. Respect the victim's privacy, but recognize that sometimes performing appropriate medical treatment will require removal of clothing, elimination of fluids and waste and other intimate actions. Try to obtain the victim's consent before dealing with such sensitive problems.
- Don't tell the victim that the accident was their fault. Don't make any deprecating remarks or imply that they were clumsy or otherwise inadequate. Do sympathize with their plight.

Perhaps the best way to approach the bedside manner question in your own mind is to put yourself in the place of an injured person and recall the kind of conduct that made you feel good as opposed to apprehensive, frightened, or possibly angry. It is very helpful to discuss the subject in a meeting with other leaders, preferably of both sexes. The more you are aware of the importance of your bedside manner, the easier it will be for you to put it to use in the stressful situation of dealing with an injury on one of your trips.

## Reported Outings Injuries and Illness

Major Category	Minor Category	Non-Technical	Technical	Combined
Evacuation	Helicopter	4	7	11
	Litter		2	2
	Sled	1		1
	Other & Unknown	3	5	8
Sprain/Strain	Knee	20	5	25
	Elbow	1		1
	Ankle	34	11	45
	Groin		1	1
	Wrist/Hand	6	2	8
	Back	1		1
	Leg	1	2	3
Fracture	Ankle/Foot	16	11	27
	Vertebra	0	2	2
	Lower Leg	8	4	12
	Hand/Wrist	14	7	21
	Rib	4	3	7
	Hip/Pelvis	6	1	7
	Elbow	2	2	4
	Femur		1	1
	Arm	5	1	6
	Clavicle/Shoulder	4	2	6
	Nose	2		2
Flesh Wound	Torso		2	2
	Extremities	29	16	45
	Head/Face	29	7	36
Dislocation	Shoulder	1	7	8
	Knee	2		2
	Elbow	1	1	2
Contusion	Torso	13	5	18
	Extremities	10	5	15
	Head/Face	6	1	7
Major Head Injury		4	3	7
Dog Bite		2		2
Heart Condition		6		6
Heat Condition		3		3
Diabetic Condition		2		2
Major Chest/Abdomen		1	1	2
Eye Injury		2		2
Marine Life		1		1
Dental Injury		1		1
<b>Totals</b>		<b>230</b>	<b>102</b>	<b>332</b>

This table, compiled by Steven Schuster, presents data for reported injuries (not incidents or persons) for an outings program in the western United States over a ten-year period.

“Technical” refers to high-angle rock climbing and snow climbing with an ice axe. In case of doubt, injuries are considered non-technical.

## The First Aid Kit

A first aid kit is like everything else when you are carrying it - a matter of weight and usefulness. It is also one of your 10 Essentials. Many items that you may need in an urgent medical situation may be improvised but some cannot. You might want to start with a readymade medical kit and add to it or start from scratch. The most important aspect is knowing what to do with what you have packed. The longer you are away from urban medical care, the more you may want to carry. No quantities have been listed here, this is a matter of preference but consider that at any given time you may have more than one person requiring your care.

<b>A FIRST AID KIT: One of Your 10 Essentials</b>	<b>Day Hiking / Backpacking</b>	<b>Optional but Useful</b>
<b>WOUND MANAGEMENT</b>		
Adhesive bandages ex. band aids	+	
Gauze pads and gauze roll	+	
ACE bandage	+	
Triangular bandage aka cravat for slings	+	
Adhesive wound closure strips ex. steri strips/ butterfly bandage	+	
Adhesive tape 1-inch roll	+	
Blister care of choice- ex. mole skin/ 2nd Skin/ gel bandages	+	
Cotton swabs ex. Q tip	+	
10ml syringe for irrigation	+	
Liquid all-purpose soap (handwashing and cleansing wounds)	+	
Non-adhering bandage ex. telfa		+
Heavy compress dressing/ sanitary pad (for heavily bleeding wounds)		+
<b>MEDICATIONS</b>		
Antibiotic ointment	+	
Ibuprofen	+	
Acetaminophen	+	
Antihistamine ex. Benadryl	+	
Personal medications (pack more days than needed when backpacking)	+	
Emergency electrolytes ex. Gatorade powder	+	
Iodine/ chlorine water treatment	+	
Antidiarrheal		+
Hydrocortisone cream		+
<b>MISCELLANEOUS</b>		
Exam gloves (at least two sets)	+	
Medical report form and pencil	+	
Additional baggie: e.g. a zip lock for making a cold compress with snow or to use for irrigation (puncture a corner)	+	
Waterproof case (zip lock bags works fine)	+	
CPR face mask	+	
Sanitizer	+	
Scissors (small, may be found on a Swiss Army knife)/ trauma shears	+	
Safety pins	+	
Splinting materials ex. SAM splint (can be improvised from items carried)		+
Tweezers		+
Hand warmers		+
Thermometer		+

## Suggested Reading and References

**Carline, Jan D., Martha J. Lentz, and Steven C. McDonald. *Mountaineering First Aid: A Guide to Accident Response and First Aid Care*. Seattle: The Mountaineers, 2004.**

A very friendly and accessible text but not as complete as the two following. The material on patient assessment is only fair. This is the only text listed here that might be small and light enough to be carried by a group as part of the communal gear.

**National Safety Council and Wilderness Medical Society. *Wilderness First Aid: Emergency Care for Remote Locations*. 2nd ed. Sudbury, MA: Jones and Bartlett, 2005.**

If you are going to buy one WFA textbook, this is the one. It is readable, it is reasonably complete, and it is sponsored by the Wilderness Medical Society. It has a fairly good chapter on patient assessment.

**Schimelpfenig, Tod and Joan Safford. *NOLS Wilderness Medicine*, 4th ed. Mechanicsburg, PA: Stackpole, 2008.**

Good coverage of the fundamentals, clearly written. A good choice for a single WFA text, striking a good balance between readability and completeness. Nice line drawings.

**National Ski Patrol. McNamara, Edward C., David H. Johe, and Deborah A. Endly, eds. *Outdoor Emergency Care*. 5th ed. Bston: Brady, 2012.**

This is the ski patroller's bible for outdoor first aid. A coffee table size reference book, it is not cheap (about \$100 for hardcopy, e-versions and PDFs are less expensive). This text goes into great depth and is meant to be studied, not read casually. It assumes the availability of backboards, oxygen and radio communication.

**Wilkerson, James A. *Medicine for Mountaineering and Other Wilderness Activities*. 6th ed. Seattle: Mountaineers, 2012.**

The title says "medicine," and they mean it. This is not a first aid text. This would be a useful handbook for medical professionals who want to learn more about outdoor medicine.

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## References

### FIRST AID

American Red Cross and Kathleen A. Handal. *The American Red Cross First Aid and Safety Handbook*. Boston: Little, Brown, 1992

### WILDERNESS FIRST AID AND MOUNTAINEERING MEDICINE



Carline, Jan D., Martha J. Lentz, and Steven C. McDonald. *Mountaineering First Aid: A Guide to Accident Response and First Aid Care*. Seattle: The Mountaineers, 2004.

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