

OUTINGS, SAFETY AND TRAINING POLICY

Orange County Sierra Singles

Angeles Chapter, Sierra Club

February 2009

Approved:

By majority vote of OCSS Management Committee on:

2-18-2009 by Kim Breul, OCSS Secretary

By the Angeles Chapter Safety Committee on:

3-23-09 by Phil Wheeler, Chapter Safety Chair

3-23-09 by Randall Danta

1.0 **GENERAL**

1.1 **Organization** - Orange County Sierra Singles, Angeles Chapter, Sierra Club, (OCSS) is a self-governing section of active single adults whose members participate in a variety of outdoor activities, traditionally called outings, under the auspices of the Sierra Club. This policy establishes specific requirements for the management and safe conduct of OCSS outings. This policy should be read as a supplement to the Angeles Chapter Safety Policy and to National outings policies.

1.2 **Outings program** – OCSS sponsors a wide variety of outings geared to many interests and fitness levels. Although most of its outings are in Southern California, it conducts some national and international trips every year.

1.2.1 **Conditioning hikes** – OCSS routinely conducts conditioning hikes. Angeles Chapter Safety Committee has granted an exception to the general two-leader rule for OCSS conditioning hikes. The policy for conditioning hikes is detailed in Section 2.4.1 below.

1.3 **Outings ratings** – OCSS sponsors outings with the following ratings:

- **C (conducted)** - Under external control of a guide, ranger, concessionaire, etc.
- **O (ordinary)** - Involves no technical difficulty (e.g. hiking on trails).
 - **O Level 1:** Day trips.
 - **O Level 2:** Overnight or multi-day trips.
- **I (intermediate)** - Involves travel off trails, where field navigation may be necessary, but no exposed rock or snow climbing or specialized techniques are required.

The definition of these ratings is subject to change by Angeles Chapter Safety Committee.

OCSS may from time to time sponsor outings requiring a T (technical) rating. Safety procedures for those outings will be described in a separate policy or policies.

1.4 **Governance** – OCSS is governed by a Management Committee, elected by the membership. The Management Committee appoints and delegates day-to-day control over the outings program to two offices, which may at the Committee's option be

filled by one person:

- The **Outings Chair** shall have at least an “O” rating and shall supervise the planning, financing, approval and conduct of all OCSS outings. The Outings Chair shall monitor National and Chapter outings policy and shall inform leaders of all policy changes that are likely to affect OCSS outings.
- The **Safety Chair** shall have at least an “O” rating and shall be picked from among the most experienced leaders in OCSS. The Safety Chair shall see to the safe conduct of all OCSS outings, investigate all accidents or incidents and review and make recommendations on all proposed changes to this policy. The Safety Chair shall monitor Chapter and National safety policy and shall inform leaders of all policy changes that are likely to affect OCSS outings.

- 1.5 **Publications** – OCSS publishes a bimonthly newsletter, *Orange Peel*, and maintains a website at <http://angeles.sierraclub.org/ocss/> *Orange Peel* is mailed to all members of OCSS. In this policy, the word “publication” means any public notification, whether in print, on the web or in any other media. A copy of the *Orange Peel* shall be sent to the Angeles Chapter Safety Committee chair or his or her designee.
- 2.0 **OUTINGS PROCEDURES** – All OCSS outings shall be conducted in accord with this policy, Angeles Chapter safety policy and National Sierra Club policy.
- 2.1 **Definition of an outing** - An outing is a Sierra Club activity whose success and safety is dependent upon the leadership ability and emergency performance of the leaders, whether they are Sierra Club leaders, professional guides, Forest or Park Service Rangers, or others directly responsible for the group. Outings involve leading participants to destinations in groups, especially to places where professional emergency assistance cannot be promptly obtained. An activity without any of these elements of group control, remoteness, and responsibility for safety shall not be considered an outing, but a social, conservation or public affairs activity. Examples:
- A casual beach walk on a guarded beach incidental to a picnic is a social event, but a walk on a remote beach is an outing.
 - A hike in the city, on patrolled city streets, or a trip to a museum, the zoo or a theater, is an outing if the leaders must exercise group control to return on time, even though

emergency assistance is available. But a city outing where participants can come and go as they please, such as a picnic in a park, is a social event.

- A volleyball game in a city park is not an outing but a social event.
- A lawn party or picnic to raise funds for conservation is not an outing, but a trip to a remote area with hiking to points of conservation interest is.
- Downhill ski trip at an area patrolled by a ski patrol is a conducted outing.

2.2 **Outings notice requirement** – A notice for each OCSS outing shall be published in the *Orange Peal* or, at the discretion of the outings chair as described in Section 2.2.1 below, on the OCSS website. Events of wider interest may also be announced in the Angeles Chapter Schedule of Activities, the Southern Sierran, another Sierra Club newsletter, or any other official Sierra Club publication or website. No outing shall be conducted without prior publication.

2.2.1 **Web-only outings notices** – OCSS plans to publish notices for some of its outings exclusively on the World Wide Web, including its own website. At some future date OCSS may choose to publish all outings exclusively on the web. Web-only publication will be subject to conditions set by Angeles Chapter Safety Committee.

2.2.2 **Submission of outing notices** - Notices shall be prepared by leaders and submitted to the OCSS Outings Chair at least one week before the deadline for publication. The Outings Chair may set an earlier deadline by publishing it in *Orange Peal* and on the OCSS website.

2.2.3 **Approval of outing notices** - No outing notice shall be published without the prior permission of the Outings Chair, except as described in Section 2.2.3.1 below. Before approving publication the Outings Chair shall determine that the leader meets all qualifications detailed in Section 3.1 below. The Outings Chair shall also determine that the notice and proposed trip rating accurately reflect the trip plan.

2.2.3.1 **Approval by others** – The Outings Chair may appoint one or more assistants to review and approve trips for publication. This individual will act when the Outings Chair needs help or is unavailable. The Outings Chair shall inform the Management Committee and the Safety Chair of the name and contact information for any such individual. The Outings Chair may appoint

any OCSS member to review and approve “C” rated outings. The Outings Chair may appoint any OCSS member with at least an “O” rating to approve “O” and “I” rated trips. No such individual will approve web-only notices without meeting all requirements established by the Chapter Safety Committee.

- 2.2.4 **Content of outing notices** – All notices shall indicate the location, goals, duration and expected difficulty of the outing, and the names of the leaders and reservationist. All such persons shall be Sierra Club members and meet all other requirements set by National and the Angeles Chapter.
- 2.2.5 **Format of outing notices** – All outing notices shall conform to the standard Angeles Chapter format, as published in the Schedule of Activities.
- 2.2.5.1 **Special format for provisional leaders** – The *Orange Peel* and OCSS website will, in all notices for outings led by provisional leaders, specifically identify the leaders as provisional. This is intended so that participants can decide whether to follow and so that OCSS can recognize its newest leaders.
- 2.3 **Outing sign-in and waiver** – All participants in OCSS outings, except the leader and assistant, shall sign a sign-in and waiver form prescribed by the Angeles Chapter Safety Committee. A copy is attached as Appendix 1. It is not necessary for the leader and assistant to sign-in, though it is recommended that they provide emergency contact information on the form. Trip leaders are responsible for circulating this form and for ensuring that no one participates without first signing the form. Would-be participants must have the opportunity to read the waiver and decide whether to sign it before the trip begins. On a long day trip, that means circulating the waiver and collecting signatures at the carpool point rather than at the trailhead. On a multi-day trip, that means circulating the waiver to all likely participants before the trip.
- 2.3.1 **Early sign-outs during trip** – Any participant who wishes to leave the outing before it ends shall be asked to sign out from the outing on the sign-in and waiver form. If a participant leaves but refuses to sign out, the leader shall sign the participant out, noting this action and the reason for it on the form.
- 2.3.2 **Waiver archive** – As soon as possible after the outing concludes, the leader shall send the completed sign-in and waiver form to the OCSS Outings Chair. The Outings Chair or a designee shall store these forms for seven years after the trip date.

- 2.4 **Outings leadership** – Each outing shall be conducted by one and only one principal leader, who shall be assisted by at least one principal assistant leader (or by qualified substitutes, if necessary). The names of both leaders shall be listed in the published notice. The principal leader and assistant shall meet all the qualifications detailed in Section 3.1 below. Leaders shall be capable of conducting the outing, controlling the group, and shall be capable of handling emergencies using appropriate Sierra Club procedures. Leaders shall know the areas to be entered and the conditions to be encountered.
- 2.4.1 **Conditioning hike leadership** – All conditioning hikes shall have one principal leader who shall meet all the qualifications stated in Section 3.1 below. Conditioning hikes may be broken into two or more groups based on pace, terrain or other factors. The principal leader of every group within a conditioning hike shall meet the qualifications in Section 3.1. The principal leader of a group may choose any Sierra Club member who is familiar with the hike to act as assistant and to “sweep” the group; this assistant shall be identified to the group before the group leaves the meeting area.
- 2.5 **Outings goals** – Safety is the paramount goal of every OCSS outing. The leaders shall be mindful of the group’s safety at all times. Participants are expected to cooperate in achieving this goal. The principal leader, at his or her sole discretion, may turn around the outing or modify the objective in the interest of safety.
- 2.6 **Finances** - Leaders of outings involving money shall follow OCSS financial policies in handling funds. Outings pricing shall include allowances for contingencies. Leaders shall keep outings funds separate from their personal funds. Participants shall be instructed to make checks payable to OCSS, and all funds received shall be deposited in the OCSS Seller of Travel CST 2087766-10 bank account. Advances shall be made with OCSS funds, and payments shall be made by the OCSS bookkeeper or treasurer upon approval and receipt of written notice from OCSS Management. Leaders shall make financial reports in the form prescribed by the OCSS Management Committee.
- 2.6 **Extended or foreign outings** - Foreign outings may be scheduled only upon approval by the Angeles Chapter International Trip Liaison and the National office. Special insurance coverage may be required for foreign outings.
- 3.0 **LEADER QUALIFICATIONS**

- 3.1 **General qualifications** – Every person leading an OCSS outing shall be a Sierra Club member, hold a permanent or provisional Angeles Chapter rating equal to or greater than the trip rating, and hold current first aid and Outings Leader Training – Basic (OLT-101) certifications as prescribed by the Sierra Club and the Angeles Chapter Safety Committee. At least one Leader needs to be an OCSS member.
- 3.1.1 **Reservationists** – Trip leaders may choose to appoint a reservationist, who shall be the primary contact with potential participants. The reservationist must be a Sierra Club member but need not meet the other qualifications described for leaders in this section.
- 3.2 **Currency** – All leaders must be current in all appropriate Chapter and National requirements at the time they lead trips. For the purpose of determining currency, the Outings Chair shall have access to the chapter and OCSS databases of members and leaders. The Outings Chair also may ask leaders to provide proof of currency. The Outings Chair shall reject outings notices from leaders who are not current or who have declined to provide proof that they are current in all Chapter and National requirements.
- 3.3 **Problem leaders** – If the Safety Chair determines that a leader violated these policies or neglected generally recognized safety procedures, he or she may advise, caution or reprimand the leader. In the event of serious or repeated violations, the Safety Chair may suspend the leader's privilege of leading trips for OCSS for a stated period of time or until specified conditions are satisfied. When suspending a leader, the Safety Chair shall deliver written notifications to the leader, the Outings Chair, and the chair of the Management Committee. During the suspension period, neither *Orange Peel* nor the OCSS website shall publish outings notices for trips led or assisted by the suspended leader. Within 30 days of being suspended, the suspended leader may appeal this action in writing to the Management Committee. The Management Committee shall affirm, modify or reverse the suspension within 30 days of receiving the appeal.
- 4.0 **PARTICIPANTS**
- 4.1 **Rules of Conduct** – Participants are expected to obey the Rules of Conduct, as published in the Schedule of Activities and posted on the Chapter website at <http://angeles.sierraclub.org/outings/CodeConduct.asp> They are

also expected to follow the leaders' directions. Leaders may escort participants back to their cars or may refuse to take them at all if, in the leaders' judgment, the participants have disobeyed or have a past record of disobeying the Rules of Conduct and the leaders' directions.

4.2 **Participant screening** – Leaders should take care in writing the trip notice to accurately describe trip conditions so that participants can judge for themselves whether they are prepared for the trip. Leaders may inquire into participants' health and conditioning when that is reasonably necessary. Leaders in their sole discretion may reject participants whose health, conditioning, equipment or training may be inadequate for the trip.

4.3 **Problem participants** – If a participant repeatedly has violated the Rules of Conduct or ignored the leaders' direction, or has committed one serious violation of the rules or of the leaders' direction, the Outings Chair or the Safety Chair may suspend that participant's privilege of participating in OCSS outings for a stated period of time or until specific conditions are satisfied. The Outings Chair or Safety Chair will send a written notice of suspension to the participant with a copy to the other chair and to the Management Committee chair. All OCSS leaders will be notified of the suspension period and directed not to allow the suspended participant to sign into OCSS trips during that period. The participant may file an appeal to the Management Committee within 30 days. The Management Committee will affirm, modify or reverse the suspension within 30 days after receiving the appeal.

5.0 **EMERGENCY PROCEDURES**

5.1 **First aid** – On all trips more than one hour from emergency medical services, OCSS leaders shall carry a first aid kit. A basic first aid kit is described in Appendix 2.

5.2 **Missing leaders** – If one of the principal leaders does not show up at the scheduled time and place of the outing, the other leader may appoint another appropriately rated leader from among the participants. If a second appropriately rated leader cannot be found, the trip shall be cancelled. The leader shall not, under any circumstances, offer to lead or participate in an unofficial trip with the participants.

5.3 **Splitting the group** -- Leaders shall avoid splitting the group whenever possible. When such splitting is necessary, the leader shall appoint two individuals to lead and sweep each group.

Whenever possible, the leader will appoint rated Angeles Chapter leaders for this task. If rated leaders are not available, the leader will choose Sierra Club members based on their experience or knowledge of the area.

- 5.4 **Accidents, incidents, and emergencies** - Leaders shall be prepared to deal with injuries, illness or other emergencies, recognizing emergencies early and responding completely. Other specific requirements shall be as follows:
- a. In cases of an accident or sudden illness, at least one person shall stay with the injured or ill while others contact the leader.
 - b. All participants are expected to cooperate fully with the leader and to remain with the group in spite of previous personal commitments, unless otherwise directed by the leader.
 - c. The group shall first draw upon its own resources in the resolution of the crisis.
 - d. Should the situation be beyond the capabilities of the group, then the use of professional assistance is warranted. In the event of an emergency requiring search or rescue, leaders shall contact the National Park Service or the county sheriff, and the Sierra Madre Search and Rescue Team.
 - e. Messengers sent for assistance shall wherever possible be given complete written instructions, using the Sierra Club Emergency Response/Patient Report or similar form. A copy should be retained by the leader. See Appendix 3 for this form.
 - f. The leader shall direct search and rescue efforts until legally responsible search and rescue personnel arrive.
 - g. All accidents, illnesses, or other serious incidents that require medical treatment, evacuation, other emergency response, or that compromise outings objectives shall be reported to the Sierra Club national office, Angeles Chapter, the Angeles Chapter Safety Committee and the OCSS Safety Chair as soon as possible, using the Angeles Chapter Incident Report form. A copy of the Emergency Report (if used) should be attached. See Appendix 4 for the Incident Report.

ATTACHMENTS

Appendix 1: Angeles Chapter Sign-in and waiver form

Appendix 2: Basic first aid kit

Appendix 3: Angeles Chapter Emergency Response – Patient Report

Appendix 4: Angeles Chapter Incident Report Form