

Angeles Chapter Safety Policy (ACSP): Approved by Angeles Chapter Executive Committee 11-20-16

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 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.