



**2022 Edition
PART ONE
of TWO**

**Chapters
1-5**

LEADER'S REFERENCE BOOK

Angeles Chapter Leadership Training Program

SAFE SPACE AGREEMENT

Outdoor Activities runs programs that insist on a safe space agreement between participants, leaders, volunteers, and staff. We want to support everyone in exploring, enjoying, and protecting these phenomenal spaces, and hateful and dangerous behavior will not be tolerated. We don't want to deny participation in these outdoor programs and we will always say no to racism, sexism, ageism, homophobia, impairment, and disruption.



August 2022 Edition
Leadership Training Committee, Angeles Chapter, Sierra Club

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Angeles Chapter leaders and candidates:

If you have taken the National Outings Leadership Training (OLT),
you will need to read this Leaders Reference Book (LRB), Part One.

Candidates also read Part Two. See the [LTC website](#) (links to the “LRB” page).

Welcome!

"...an outing simply needs to be a time where we reduce barriers and expand access for all people to explore and enjoy nature."



Welcome to the Sierra Club Angeles Chapter Leadership Training Program (LTP)! 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. The Angeles Chapter has the largest outings program of any Sierra Club Chapter, with 2,000 trips in a typical a year. We are glad to have you join us!

Sierra Club outings offer something special, rewarding and of lasting value to the public. Becoming a leader with us represents a commitment to the Sierra Club's Core Values and its Mission (see Chapter 2). The pages that follow describe the steps to becoming a new outings leader for the Angeles Chapter as well as providing fresh insights for established leaders. Our goal is to help leaders conduct safe, enjoyable, and environmentally inspired outings as ambassadors for the Sierra Club.

LRB Part One: Chapter 1 describes the nuts-and-bolts of our program and how to get certified; Chapter 2 outlines the Sierra Club's mission and priorities and how outings supports the mission; Chapter 3 covers Safety; Chapter 4 will show you best practices in leadership and how to conduct successful outings; Chapter 5 is about first aid. **LRB Part Two** includes Chapter 6: navigation; chapters 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; 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 New "OLT"

The new National Outings Leadership Training (OLT) rolled out in 2022 with an 8-module web-based course that is available from Campfire Learning. LTC is exploring ways to combine this online self-paced e-learning with our own training style and Chapter requirements. In any case, this LRB and its future iterations incorporate the new concepts and values throughout.



The Leadership Training Committee's website is your resource for updates and information as well as access to needed Forms, policies and outings news. Go here to access this book and its chapters and see "How to Use the LTC Website" later in this chapter.

sierraclub.org/angeles/leadership-outings

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. Some of these may be familiar and some not so familiar to new leader candidates.

- AKA: Also Known As
- AMP: Advanced Mountaineering Program
- ExCom: Executive Committee of the Angeles Chapter
- GPS: Global Positioning System; also refers to Griffith Park Section!
- 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)
- OC: Outings Chair (of a GSC); can also refer to Orange County
- OCSS: Orange County Southern Sierrans
- OLT: Outings Leadership Training (National and/or Local, e.g. Angeles Chapter)
- OMC: Outings Management Committee
- USGS: United States Geological Survey
- UTM: Universal Transverse Mercator (mapping coordinate system)
- WAS: Wilderness Adventures Section
- 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: May sponsor outings or focus on conservation or political action, etc.
- TASK FORCE: Focus on an immediate or ongoing environmental issue; may sponsor outings.
- LOCAL: "Local" refers to all of the above as sponsors of "Local Outings" as opposed to National Outings which has its own program.

Campfire

Campfire refers to a suite of tools for engaging with the Sierra Club. It includes Campfire Events, Community and Learning and more. Campfire Events is the tool for inputting an activity into the database to be approved and ultimately advertised to the public via websites such as the [Schedule of Activities](#) page on the Angeles Chapter website and via entity sites.

Learn more here: <https://www.sierraclub.org/angeles/leadership-outings/campfire-events-training>



Chapter 1

1. The Leadership Training Program

The Angeles Chapter Leadership Training Committee (LTC) creates, organizes, and sponsors activities and materials for training outings leaders and anyone who wants to lead folks outdoors whether for an urban walk, a peak-bag, or a far-flung adventure. The program starts with an introductory seminar that covers all the basics from safety, first aid and conservation leadership best practices and scenarios.

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. Want to know more about the Chapter's outings program? Visit the LTC website of course. Want to know about how the program is structured? Visit:

<https://www.sierraclub.org/angeles/leadership-outings/management>

Leading for the Angeles Chapter

What's 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. *Learn more about the history of LTC and Safety Committee in [Chapter 3](#).*

Chapter Outings Ratings

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 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.

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.). Angeles Chapter requires CPR currency when leading a Provisional. Other entities may also require currency to lead for them. See also Maintaining Your Rating in this chapter and the LTC website.
- **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 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 / evaluator who can also serve as a mentor.
- **After your provisional outing:** Send your self-evaluation and the assistant leader’s evaluation to the LTC Administrative team.
- **Certification.** The Safety Committee reviews evaluations and certifies you to lead for the Chapter!

***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.



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.

For information about Sierra Club membership – [Join here!](#)

About 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. LTC checkoffs, practices and similar training outings usually do not qualify. A navigation practice day that includes a typically-led hike may qualify.
- 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.

Completion Requirements for All Ratings

A summary of the Leadership Training Program (LTP) requirements is outlined in the chart below. Each of these requirements is explored in more detail throughout this chapter and other chapters in this Leader's Reference Book (LRB).

The National Sierra Club and/or 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.

See the chart on the next page.

SUMMARY OF LTP COMPLETION REQUIREMENTS FOR NEW LEADERS								
Requirements	O-1 & O-2	I	M-rock	M-snow	M	E-rock	E-snow	E
LTP Seminar & pre-exam	1 day	1 day	1 day	1 day	1 day	1 day	1 day	1 day
Standard First Aid	Yes							
CPR	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Yes
Wilderness First Aid 24+ hours		Yes	Yes	Yes	Yes	Yes	Yes	Yes
Environmental Awareness		14 hours	14 hours	14 hours	14 hours	14 hours	14 hours	14 hours
EXAMS (M & E)			M yes	yes	yes	E yes	yes	yes
Technical Checkoffs (Checkouts)								
Navigation		I/M Nav.	I/M Nav.	I/M Nav.	I/M Nav.	E Nav.	E Nav.	E Nav.
Rock			M-rock		M-rock	E-rock		E-rock
Snow				M-snow	M-snow		E-snow	E-snow
Provisional Leads								
Provisionals (number)	1 each	2 ²	1-2 ³	1-2 ³	2-3 ³	2 ⁴	2 ⁴	3 ⁴

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

² 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.

³ 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.

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

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 for information.

Visit <https://www.sierraclub.org/angeles/leadership-outings/leadership-training-seminar>.

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. 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 Angeles Chapter group, section, or committee (GSC).

Provisional Leadership

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. 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.

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.

Get to know your outings chair! Every entity has someone who coordinates, schedules and publishes 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!



Tip: learn about Sierra Club structure in [Chapter 2](#).

Now That You Are a Provisional Leader

There are different requirements for O, I, M and E provisional outing(s). Here are the basic steps, starting with the O level (example below), but these steps are similar among all the ratings.

- 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, for example, an on-trail day hike, urban walk or an overnight car camp. Your sponsor can tell you about options. 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. See more on Designing and Planning your trip in Chapter 4 and Safety considerations (Chapter 3) such as your Safety Management Plan and any COVID-19 requirements or recommendations.
- 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 writing up and advertising trips in Chapter 4.*
- Once your outing has been published, you may also list it on social media sites. 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 and, in some cases, a medical form will be required.



See [Chapter 4](#) for Designing, Planning and Conducting your outing and [Chapter 3](#) on Safety. And note that I, M and E levels have additional requirements. It's a good idea to check back with our LTC website on ratings and policy updates.

Assistant Leaders / Evaluators 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* aka Mentor Leader 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 evaluator should not be so familiar with you that an impartial evaluation might be compromised. In addition, they must be fully capable of conducting the outing and have the authority and responsibility to assume leadership of the outing at any time if they believe that the safety or well-being of the group is being jeopardized by your actions.

The Assistant/Evaluator can't be someone with a close relationship with you, i.e., a spouse, partner, or close relative. They need 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.
- Your assistant leader will observe and evaluate you and provide you with a written performance evaluation. (You'll also write your own self-evaluation.)

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.

Overview: Planning and Leading your Provisional Outing

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 Chapter 4 for how to do this.

Publication is required for all outings, provisional or not. The outing write-up must include the name of the leaders and describe pertinent information about the outing. 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."

 *Designing, planning, and conducting your outing are covered more in Chapter 4 and in subsequent sections in this chapter.*

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 evaluating 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. 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. 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 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 cross-country travel conditions.

Designing Your Trip

Whether you are designing an urban exploration or a beach excursion or mountain adventure, Sierra Club Outings enhance the Mission, values and goals outlined in Chapter 2: 1) Reduce barriers and expand access for all people to explore and enjoy nature; 2) Integrate outings and outdoor activities into Sierra Club culture, campaigns, programs, and activities at the national and local levels; and 3) Establish clear pathways for engagement between outings and advocacy. Your write up is an important way to reflect on how our outings can achieve these goals.



See [Chapter 2](#) for Values and [Chapter 4](#) for more on designing and advertising your trip effectively and with inclusivity in mind. See also Trip Planning pages on the LTC website: <https://www.sierraclub.org/angeles/leadership-outings/trip-planning>

Advertising Your Trip

When you look at a Chapter or GSC website, you will see a “feed” from the online publishing tool, Campfire Events. The Chapter’s [Schedule of Activities](#) also includes social events and meetings. Outings are input by your outings chair, or even by rated leaders – and eventually by YOU. Look at various events to gain ideas for your writing style and display possibilities. See Chapter 4.

A Word about Campfire Events

Being designated as a “Leader Trainee” gives you access to the Campfire suite of tools. Your ability to access and enter an outing into Campfire Events depends on your outings chair giving you “permission” to do so by adding you as a provisional (or certified) leader for their entity. 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.



More on Campfire in Chapter 4. More detailed Campfire Events training is available here: <https://www.sierraclub.org/angeles/leadership-outings/campfire-events-training>

About First Aid

A Sierra Club leader needs to be prepared to handle illnesses and injuries that might happen on outings. You will be responsible for caring for the patient until they can be taken to medical care. Your First Aid training should match the types of hazards you are likely to encounter, and 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. Currency in WFA depends on the sponsoring GSC and whether you are seeking a higher rating.



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.

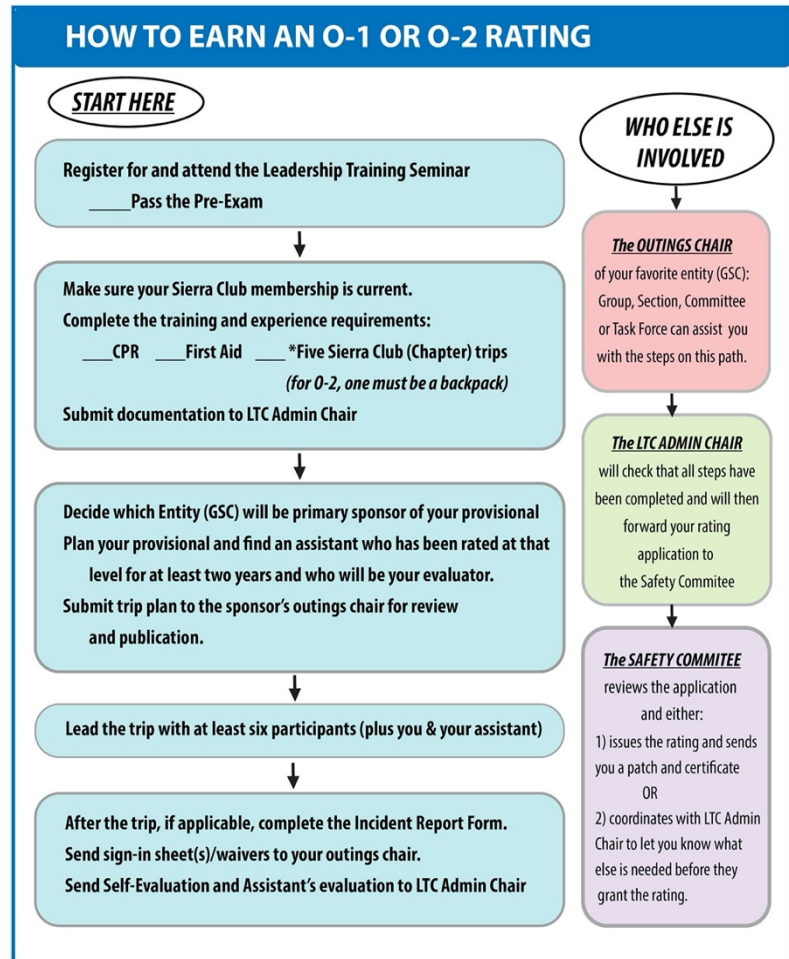
The O Leadership Rating

“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 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 a blended 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 in this chapter for what you need to do to stay current, refreshing OLT and First Aid. And see the [LTC website](#) for latest details and review Chapters 3 and 4 for updated safety information and latest ways to enhance your leadership knowledge.

The Provisional O Outing

- You need at least 6 participants for the duration of your trip, in addition to you and your assistant.
- 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.

**For Camping trips (car camp, etc.), consult with your sponsoring entity. All Sierra Club hikes done from a car or base camp must have two appropriately rated leaders.*

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.

Navigation Basics

[Chapter 4's Checklist and Guide](#) section has several useful items including “**Navigation Basics for an O Level Trip.**” Setting you all up for success is our goal at whatever level you lead.

After your O Provisional

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

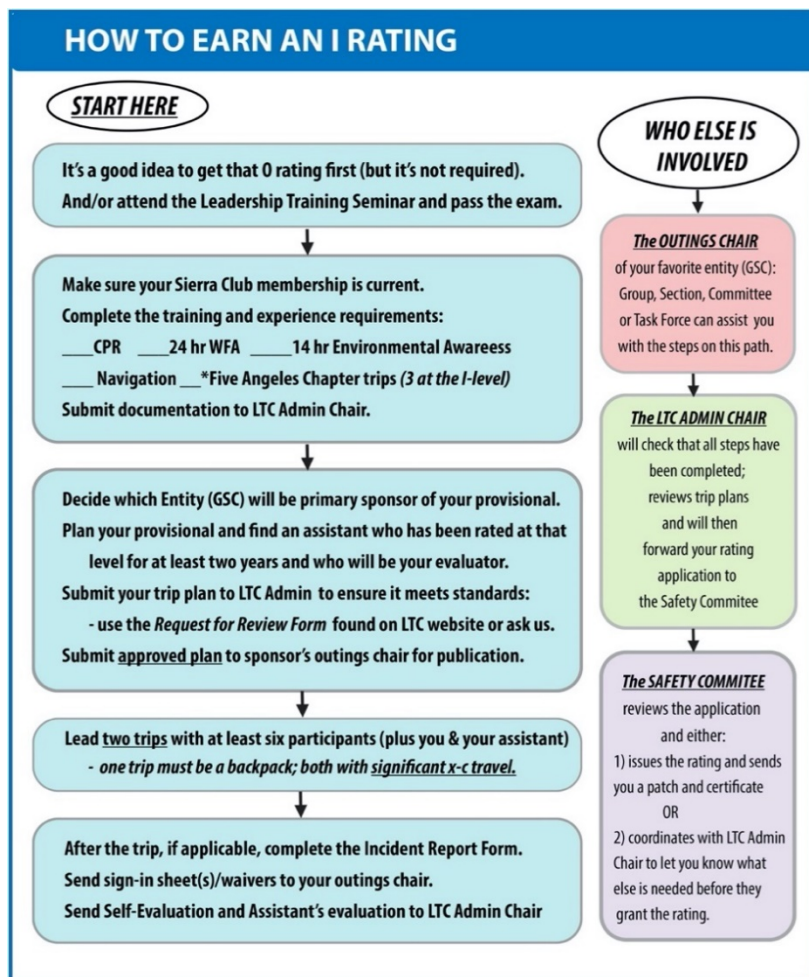
Certification: Completion of provisional leads does not guarantee automatic certification by the Safety Committee. Because becoming an Angeles Chapter leader is a privilege, not a right, the LTC reserves the right not to approve a potential leader if it deems that the candidate lacks sufficient leadership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

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.

See this chart also on the I-Rating page on the LTC website. 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 (EA) Training: accomplished prior to granting the rating.
- There are many options for satisfying the (EA) requirement. See below and the LTC website.
- Lead two provisional cross-country outings. One must be a backpack.



I Experience Outings for Leader Candidates

As with the “O” rating, you will need to have completed five outings with the Angeles Chapter during the past ten years. 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. At least one 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. See also [Chapter 5: First Aid Considerations](#).

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. See this LTC page: <https://www.sierraclub.org/angeles/leadership-outings/environmental-awareness>

- 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.

Choose environmental field study programs that are specific to the area in which you intend to lead outings. See also <https://www.sierraclub.org/angeles/leadership-outings/environmental-awareness>

- **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.

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. See also [Chapter 2B: Conservation and Connections](#).

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 a form for you to use in planning your provisional outings (found on the LTC Website I-Rating page, sierraclub.org/angeles/leadership-outings/i-rating).

- 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.



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

Assistant Leader / Evaluator 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).

You will need to have different evaluators for each of the two required provisional outings. Different evaluators will give a wider, more varied response. 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.

Navigation, Rock, and Snow Technical Skills

On your way to achieving an I, M or E rating, you must demonstrate that you have the necessary technical skills by passing a technical “Checkoff,” aka “Checkout” before you lead your provisional outing(s). See also the *LRB Part Two* and [Advanced Ratings](#) on the LTC website.

LTC Technical Chairs and Process

Technical Chairs for Navigation, Rock, and Snow (Mountaineering) 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

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 LRB Part Two, Chapter 6: Navigation.
- The technical checkoff requirements for leading Rock Climbing on 3rd and 4th class terrain are described in LRB Part Two, Chapter 7.
- The technical checkoff requirements for Snow Climbing on the equivalent of 3rd and 4th class terrain are described in LRB Part Two, Chapter 8.

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). 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.



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

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.***
- ***Don’t be a no-show! Being a no-show exhibits poor leadership.***
- ***Be receptive to feedback and 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.

The Provisional Lead Committee (PLC)

A subcommittee of LTC, the Provisional Lead Committee (PLC) reviews all M and E provisional plans. PLC exists to guide leaders on their way to achieving advanced ratings. They will also work with you and interface with National's Mountaineering Oversight Committee (MOC) which has final approval. PLC members are the LTC Chairs and Admin Chair, Rock, Snow and Navigation Chairs. When you are ready, send the following items to the Provisional Lead Committee at LTCProvisionalLeadCommittee@gmail.com.

- M/E exam (for review and evaluation). Found on the [M/E Forms](#) page.
- Requests for Provisional status - include a comprehensive climbing resume (see same [M/E forms](#) page), and indicate which specific rating you are requesting (i.e. M-Rock, M-Snow, Full-M)
- Requests for approval of planned provisional outings and evaluators. Include a draft MOC application (on same forms page).

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.

Advanced Ratings: M and E

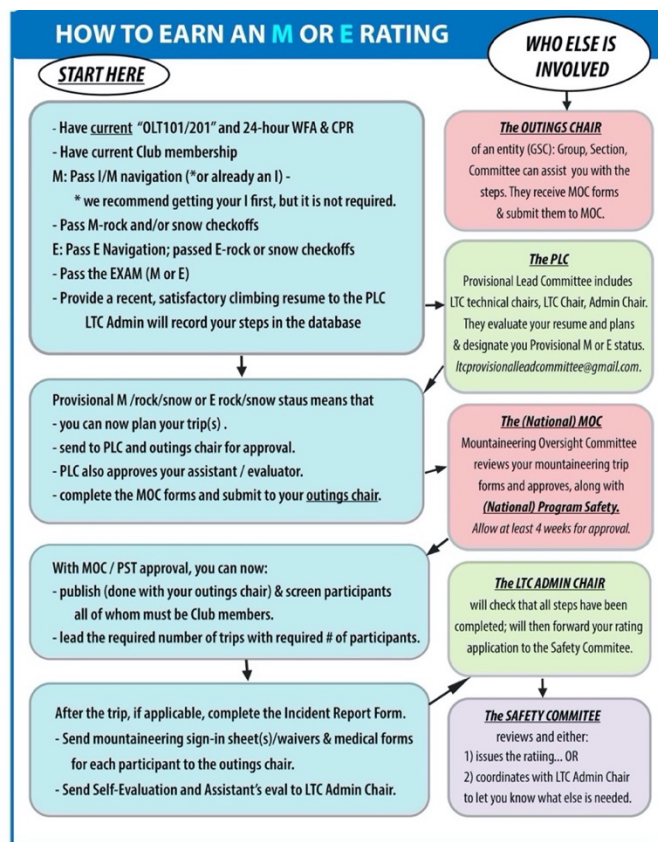
The chart is also visible on our LTC website on the Advanced Ratings page.

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, 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.

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.



Restricted outings are open only to Sierra Club members and need to be approved by the Mountaineering Oversight Committee. See [M-E Forms](#) page for applications and forms.

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 evaluate 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 site under Advanced Ratings.

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.

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 resumé. A sample is available on the [Advanced Ratings](#) pages.
- Your resumé should detail M and E climbs (Angeles Chapter outings or their equivalent) during the last three years. You will want to keep this 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 resumé for both you and your assistant / evaluator, along with a draft Mountaineering Oversight Committee (MOC) application (“non-training”) to LTCProvisionalLeadCommittee@gmail.com. Mountaineering Oversight Committee (MOC) applications are [here](#) for “non-training” and “training” outings. 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 PLC. Address queries to LTC Admin and the PLC @ ltprovisionalleadcommittee@gmail.com

You will need to have different evaluators for each of the required provisionals, 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 for the Angeles Chapter (e.g., as an O-1/O-2 or “I” rated leader).



M-E Forms: <https://www.sierraclub.org/angeles/leadership-outings/m-e-forms>.
See also Chapters 3 and 4.

Submitting Your Provisional Evaluations

You will submit your provisional leader self-evaluation and your assistant leader’s evaluation to the LTC Admin who will review it for completeness and will then forward it, with all of your paperwork and any recommendation 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.

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. To be accepted on any M or E outing, WTC student participants should be carefully evaluated for appropriate skills. *See more on evaluating participants in [Chapter 4](#).*

After Your Provisional I,M,E Outings

Evaluations: Upon completion of your provisional outings, send your self-evaluation and your assistant leader’s evaluation to 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 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.

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 membership.

Use this downloadable [Progress Checklist](#) (as on right) or your own version to track your journey. This one includes the advanced requirements which can be useful if you want to advance your rating. If you do 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.



Visit this the [Steps to Leadership](#) page on our website.

PROGRESS CHECKLIST					
<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>					
Name			CPR Date / Provider		
Club member #		Expiration	SFA Date / Provider		
			WFA Date / Provider		
LTP Seminar					
ANGELES CHAPTER EXPERIENCE TRIPS					
	Date	GSC	Level	Destination	Backpack? Y/N
1					
2					
3					
4					
5					
TECHNICAL CHECKOFFS (CHECKOUTS)					
	Date	Level	Location	Examiner	
Navigation					
Rock					
Snow					
OTHER REQUIREMENTS					
M EXAM date			E EXAM date		
Environmental Awareness 1			Environmental Awareness 2		
PROVISIONAL OUTINGS					
	Date	GSC	Level	Destination	Evaluator
1					
2					
3					
PROVISIONAL LEAD COMMITTEE (M/E) DATE:					
SUBMISSION OF PAPERWORK and RATING GRANTED DATES					

Maintaining a Leader Rating: All Rating Levels

All leaders are required to maintain their rating in order to lead. LTC does not take away your rating if you do not lead for a while; but you will need to recertify and be current when you do resume. See more below.

Staying Current: OLT

To maintain your leader rating, you must “refresh” OLT 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://sierraclub.org/angeles/leadership-outings/olt101)



Attention rated leaders and Outings Chairs! There is no longer an “OLT201.” The new National OLT as well as our LTP seminar covers overnight trips.

Staying Current: First Aid, CPR, and WFA

Sierra Club Leader Standards require all leaders to take at least Basic First Aid and remain current. Angeles Chapter also requires CPR for all candidates. The need for CPR currency depends on your sponsoring entity. Here are more details.

- 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. *During COVID, a second renewal online has been accepted.
- 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 Currency

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.
- 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.

While we do not have a requirement to "refresh" Environmental Awareness, we encourage all leaders to be familiar with current conservation goals and aware of Sierra Club campaigns and goals.

The LTC Website and Events

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 and Environmental Awareness requirements.
- **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 and includes a Frequently Asked Questions (FAQ)
- **Safety & Management** dropdown: **Incident Reporting**, **Safety Review Process**, **Safety Policy** and **Management**.



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

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: I, M, E

I, M, E provisional leaders: here are some pointers for your journey to achieving the rating. These are general reminders as well as useful tips on scheduling, navigation and more.

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

With the approval of the sponsoring 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. 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:

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.

Meeting Navigation Requirements: I-, M-, and E-level Provisionals



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 for your provisional outing

- Lead a trip 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.

LTC encourages **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 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.

See also Chapter 4 on [Planning](#) and [Conducting](#) your outing. And the [Checklists](#) at the end of that chapter.

LTC Contacts

- Questions concerning LTP progress and requirements should be directed to the LTC Admin Chair at LTCAngelesChapter@gmail.com.
 - Provisional Lead Committee (for M and E candidates): LTCProvisionalLeadCommittee@gmail.com
 - M/E forms are under “Forms” and [sierraclub.org/angeles/leadership-outings/m-e-forms](https://www.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
 - Ombudspeople: ombudsman@angeles.sierraclub.org
 - LTC webmaster lwcwebmaster@angeles.sierraclub.org
 - **See the very up-to-date LTC website for EVERYTHING.**
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Onward to Chapter Two.
Learn about Sierra Club Values, History, Structure, and Conservation priorities.
Chapter Two is in two parts: 2A and 2B.



Chapter 2

2A Sierra Club Values and History

2B Conservation and Connections

2A. Sierra Club Values and History

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.



Many of the “things we value” in the world—public lands, time outside in nature, clean air, clean water, and wildlife —continue to be priorities for the Sierra Club to protect.

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.

The 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.

Sierra Club Values and Equity Goals

In the fall of 2021, the Sierra Club Board of Directors formally adopted five Core Values grounded in equity and inclusion. These are:

Anti-Racism . Balance . Collaboration . Justice . Transformation

Sierra Club President Ramon Cruz: *“What these organizational core values commit us to is how we will interact with each other, how we show up in relationships with our strategic partners, and the approach we take as we advance our established mission. These are aspirational values for Sierra Club and are not meant to indicate these all reflect how we show up today, rather, they set guideposts for all volunteers and staff to consider as we approach our work at all levels.”*

- **Anti-Racism:** We commit to shifting power away from white supremacy, repairing harm, and ending structural racism.
- **Balance:** Our effectiveness comes from committing to caring for ourselves and others.
- **Collaboration:** We believe in just relationships that support collective work.
- **Justice:** We are accountable for our actions, our work, and how we show up with trust and respect.
- **Transformation:** We commit to changing our relationships to power, privilege, and oppression—for ourselves and for the organization.

We understand access to public lands to be a human right, honor the myriad benefits being outside provides for individuals and communities, and work to break down social and economic barriers that prevent all people from enjoying outdoor opportunities.

1. We value and honor the varied ways in which individuals and communities define, enjoy, explore, and protect our public lands, waters, and wildlife, including marginalized communities and others who have been left out of the mainstream environmental movement.
2. We proactively engage marginalized communities and reach across economic lines and cultures to explore, enjoy, and protect the environment.
3. We recognize marginalized communities as leaders in shaping the movement, value them as decision-makers, and center our work on their lived experience.
4. We foster a culture of mentorship and engagement to support the next generation of leaders who reflect the diversity of our communities, thus building a broader and more diverse movement.
5. We value the transformational over the transactional and strive to develop long-term partnerships that share decision-making, resources, and power.
6. We value multiple social justice movements, building an outdoors-for-all movement in solidarity with and as part of the movement to create a just society.
7. We practice the Jemez Principles at all levels of our organization.



A Video to watch, “Powerful Together” <https://www.youtube.com/watch?v=HtksM07PEx8>

Organizational Commitment

The **Multi-Year Equity plan** was developed to see how Sierra Club is committing to equity to form a more equitable, inclusive, and just organization. This plan has a scope that spans departments, units, and programs. It is an evolving effort, to be revisited.

Looking at the House

As you approach the organization (the House) you're greeted by a Welcoming, Inclusive Culture. Outings Leaders are one of the first contact points with people and therefore are essential in helping to create a welcoming and inclusive culture.

Above the door is another long-term goal. OLT trainings are key in providing outings leaders with ongoing skills, training, and education. All of this sits on a Foundation of Justice and Equity which is essential to the culture shift needed to achieve the goals of the Multi-Year Equity Plan.



Goal 1: ORGANIZATIONAL CULTURE AND INCLUSION Sierra Club seeks to create and foster an inclusive organizational and workplace culture — a culture that grows, nurtures, and retains diverse, engaged teams of staff and volunteers.

Goal 2: ONGOING EDUCATION, LEARNING, TRAINING, & SKILLS DEVELOPMENT The process of developing competency in applying our values and principles of equity, justice and inclusion is an ongoing, welcoming learning cycle across all organizational work.

Goal 3: FOUNDATION OF JUSTICE & EQUITY Our programmatic outcomes reflect our commitment to justice and equity. Leadership development and strategic partnerships are core strategies for long-term, sustained success in building Sierra Club and the movement.

Jemez Principles

All our outings have a direct impact on communities, whether it's a Local Outing close to home or a National Outing abroad in someone else's community. How we plan and conduct these outings are essential to how we impact these communities.

In 1996, forty representatives met with the intention of hammering out common understandings between participants from different cultures, politics, and organizations for working together more effectively to build a movement. The participants adopted the Jemez Principles of Democratic Organizing and they have become the catalyst for conversations at organizations like the Sierra Club about how to do our work more effectively with our grassroots base of activists and movement partners, especially those most impacted by environmental degradation and climate disruption. The Sierra Club Board formally adopted the Jemez Principles for use by all volunteers and staff at its March 2014 meeting.

JEMEZ in ACTION: Transformation

Our aim in working with our communities is to engage in a transformational way. Utilizing the Jemez Principles is one way we can begin to build transformational relationships. As opposed to a top-down mode of relating to partners, team-mates, even participants, consider more inclusive ways to develop relationships. Consider the differences between “transactional” vs “transformational” styles of engagement. These same styles can be applied to how we plan and conduct outings and manage groups. *Qualities of leadership are discussed in our LRB [Chapter. 4](#).*

JEMEZ Principles

Be inclusive

Emphasis on bottom-up organizing

Let people speak for themselves

Work together in solidarity and mutuality

Build just relationships among ourselves

Commitment to self-transformation

“The Principles provide guidance to building community with integrity across difference -- culturally, politically, organizationally.”

--- Allison Chin, former Sierra Club board president and current board member, was the volunteer co-lead of the Diversity Steering Committee in 2014 which put implementing Jemez in motion.

Transactional vs Transformational

Transactional relationships are based on an exchange between two or more parties OR rewards for achieving goals. Transformational relationships are based on a future vision and long term mutual gains. Look at the differences below and see how you can move towards a transformational approach.

Transactional Engagement	Transformational Engagement
Urgent, see person as “useful” to reach goals	Respect, patient, humble, gathering and sharing information
1-way flow (we “educate”); Issue specific	2-way: Both gathering and sharing information
Action	Relationship
Takes action in support of partner activities	Jointly plans and implements plans
Grants money to partner organization	Raises revenue together

One of our commitments to equity within our communities is our aim to shift away from transactional engagement to transformational engagement. Utilizing the Jemez Principles is one way we can begin to build more transformational relationships.

Read More about the Jemez Principles and Sierra Club

<https://www.sierraclub.org/planet/2017/10/sierra-club-and-jemez-principles>

Outdoors For All Theory Of Change

The Sierra Club Outings Program is guided by Sierra Club's **Outdoors for All Theory of Change** vision for a just, equitable, and sustainable future where all people benefit from a healthy, thriving planet and a direct connection to nature. The Sierra Club has long believed in the power and value of nature, but we cannot do things as we have in the past. We must start with an internal transformation, grappling with and dismantling the many ways the conservation movement has been exclusionary and even dangerous to marginalized communities. We must build a new, inclusive 21st-century environmental movement that recognizes a healthy planet is only possible when all its people are safe, respected, and heard.

- **Goal #1: Reduce barriers and expand access for all people to explore and enjoy nature.** In our parks and open spaces, we will work to ensure clean public transportation to these spaces, reduce financial barriers, and ensure that our public land management agencies demonstrate a commitment to equity and inclusion. In our cities, we will increase close-to-home access to nature, support outdoors programs for schools and out-of-school-time providers to bring nature into the lives of our children and promote the benefits of time outdoors for all communities. And finally, we will evolve our outings across the country to more closely work with, support, and center marginalized groups who have been excluded from mainstream conservation and outdoors movements.
- **Goal #2: Integrate outings and outdoor activities into Sierra Club culture, campaigns, programs, and activities at the national and local levels.** We can do this by collaborating as we train and engage new staff, leaders, members, and supporters, highlighting the incredible work of our outings leaders and providing support and education to demonstrate our collective vision and impact. By better integrating our work, we will improve people's lives through increased outdoor access, inspire a broader and more diverse movement of environmental leaders, and greatly increase the internal visibility of our outdoors work across the organization.
- **Goal #3: Establish clear pathways for engagement between outings and Advocacy.** It is necessary to reunite our outings and advocacy work by establishing a common vision and creating clear opportunities for staff and volunteers to learn, share resources, and collaborate at the local and national levels. In doing so, we will do an even better job of 1) exposing outings participants to local and national environmental and social justice issues and engaging them in ongoing advocacy opportunities, 2) encouraging a deepened relationship between conservation staff and volunteers with the places they're working to protect, and 3) inspiring and empowering more champions of the outdoors for all vision.



To Consider: What can you do as an Outings Leader to meet these goals?

Standards Of Conduct

The Sierra Club (see links below) seeks to be an equitable and just place to work and volunteer. In addition to our overall mission of advancing bold environmental policy, all our actions should explicitly seek to promote equity and justice both internally and externally. Volunteers and members have the responsibility to abide by these standards and to hold others accountable for their conduct. The Standards of Conduct cover four areas: Affirmative Standards of Conduct, Misconduct, Dealing with Disruptive Personal Behavior, Resolving Disputes. See Resources below for link to the full document.

See also [Chapter 3](#).

AN EXERCISE: Comfort Zone, Learning Edge, Danger Zone Activity

<https://www.socialjusticetoolbox.com/activity/comfort-zone-learning-edge-danger-zone/>

Sierra Club Equity, Values and Standards Resources



[*Outdoors For All Theory of Change*](#)

[*Sierra Club and the Jemez Principles*](#)

[*Equal Opportunity Policy*](#) as of December 2021

[*Angeles Chapter Rules of Conduct for Outings*](#) (to be updated in 2023)

[*Sierra Club Standards of Conduct 2019*](#)

History & Structure

Introduction

The Sierra Club has a long and complex history. When we've discussed our history in past trainings, we believed we were offering the most relevant parts by highlighting the mountaineers and our notable founder John Muir. However, these aren't the only relevant parts of our Outings history. We'll be offering a more accurate glimpse at our past to help us shape a future that is more in line with our mission to explore, enjoy, and protect.



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. And over the last several years, the Sierra Club has been coming to terms with its founding and past to create a more welcoming and inclusive future.



Video: Sierra Club's Complex Past and Present: <https://vimeo.com/336000239/26a95e8683>
How has the Sierra Club evolved?

How is the Sierra Club of the past different from today? How is it similar?

About the Sierra Club Structure Today

Supporters and Activists	3.5 million
Sierra Club Chapters	64 in the USA, including Puerto Rico
The Angeles Chapter	Approximately 40,000 members. 14 regional groups 30+ recreational sections and committees, task forces, plus political and conservation committees focused on a variety of regional and national issues

The Sierra Club is a California corporation and 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. See more about the Angeles Chapter later in this chapter.

Learn more about the Sierra Club on the website: <https://www.sierraclub.org/about-sierra-club>

A History Of Outings

In 1901, the Sierra Club's Board of Directors proposed an annual summer outing. Its purpose was to encourage people to see firsthand the country the Sierra Club sought to preserve and protect. From a charter group of 182 California mountaineers, naturalists, and educators, the Sierra Club grew dramatically during its first century to more than 700,000 members. It now consists of 64 chapters and almost 450 regional groups in the United States, Puerto Rico, and Canada.

Looking forward, Sierra Club Outings will continue its evolution of inclusiveness of under-served communities and marginalized identities. With a strategy of reducing barriers to participation, whether they be social, financial, physical, or perceived, the goal will continue to be getting our participants into and in touch with nature. The success of this effort to "explore, enjoy and protect..." will rely on building relationships with new partners and populations over the coming years.



William E. Colby worked closely with John Muir on conservation issues and also started what is now the Sierra Club Outings program.

Sierra Club Outings Today

Today, Sierra Club goes outside with over 270,000 people each year through local entities (chapter, group, section), extended tours and treks and stewardship trips designed to create lifelong connections to nature. Programs and campaigns: Inspiring Connections Outdoors, Local Outings, Military Outdoors, National Outings, and outings led as a campaign tactic of Sierra Club campaigns.

The Sierra Club has a broad array of Outings Programs. Some exist at the "National" level and are sponsored by National Outings and its subcommittees. Example: National Outings backpacks may be sponsored by the (National) Knapsack Committee. Inspiring Connections Outdoors (ICO) is a nationwide program that engages with youth outdoors that is run locally. And then there are the campaigns for which Outings can play a key role.

The Outdoors For All

A campaign that is one of three priority initiatives of the Our Wild America campaign. Outdoors for All works to ensure access to the outdoors for everyone. The campaign works with local, state, and national coalitions to advance administrative policy changes and raise decision-makers' awareness of the importance of expanding access to nature and outdoor learning and recreation; contributes to a national dialogue about equity and access to the outdoors, helping to establish access to nature as a human right and; seeks to be at the forefront of a national movement to give every veteran and youth in the United States of America an opportunity to get outdoors, whether through Sierra Club programming or with an allied partner.

Inspiring Connections Outdoors (ICO)

Each year, **ICO** volunteers provide safe, inspiring, and fun outdoor adventures with over 14,000 participants nationwide — mostly youth from communities that have been underrepresented or have

not felt welcomed in environmental and outdoor groups in the past. Over 1,000 volunteer leaders work with partner organizations to provide hiking, camping, backpacking, paddling, snow, service trips and more in areas near and far from their homes. ICO strives to create the next generation of environmental and social justice leaders, increase exposure to outdoor recreation, support grassroots community leadership, and build a broad platform for all people to access the outdoors. ICO is funded entirely by grants and generous donations.

Military Outdoors

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

Provides 'Adventure with a Cause': environmentally friendly outdoor adventures—from Tahoe to Tibet—for people of all ages, abilities, budgets, and interests to 3000+ members each year. National Outings offer 300+ volunteer-led trips annually, including lodge-based explorations, backpack journeys, canoe/kayak/raft excursions, family-based camps, long-distance international treks, cultural experiences and more. These outings are advertised on the Sierraclub.org website. Domestic trips vary typically from 5 - 10 days in length. International trips can vary from 10 days to longer treks of 30+ days. National Outings have thirteen Subcommittees nation-wide and three Subcommittees. Chapter outings leaders can also become National outings leaders.

About Local Outings

Local Outings typically offers over 15,000 local and mostly free trips each year led by over 5,000 dedicated Sierra Club volunteers across the country. Some Local Outings groups also offer activities that require more advanced skills. Outdoor activities connect folks to nature and each other in multiple ways depending on location. Activities include day hikes, urban walks, peak scrambles, bicycling, cross-country skiing, mountaineering, white water paddling, birdwatching, conservation-oriented walks, and forays into the natural areas of our major cities.

Some local Groups offer trips specifically as affinity spaces, like people living with disabilities, youth, women, Veterans and the LGBTQIA+ community. Local Inspiring Connections Outdoors (ICO) and Military Outdoors provide outdoor access opportunities through Sierra Club leadership to meet the needs of specific populations. These programs run in parallel to other local outing offerings.

CHAPTERS: Chapters offer a variety of opportunities for activism, including a range of outings--hikes and nature walks; service outings such as performing trail maintenance, digging out weeds, or measuring water quality; and other activities; actions on local and state issues; and much more.

- **(Regional) GROUPS:** Chapters may have several regional Groups, although some chapters do not. Smaller, local sub-sections, they offer similar opportunities in their immediate communities. A Chapter's website may show their Groups' activities on their calendar.

Local outings are guided by **OUTINGS CHAIRS (OCs):** The Outings Chair of each Chapter/Group provides leadership, direction, and oversight to the local volunteers and is responsible for making sure the outing

program complies with national Sierra Club standards and requirements. The Outings Chair may have a Co-Chair as well. And then there are the **OUTINGS LEADERS**: That's you! Outing Leaders are the basis of the Outings program. These volunteers plan and lead activities to engage participants, deliver Sierra Club's message and provide interaction with the environment in their communities.



No matter what your role, all of us have a responsibility to act as ambassadors for the Sierra Club. We are all on a journey towards better understanding and acting upon the values and mission. This journey will help us become better leaders.

The Angeles Chapter



SIERRA CLUB
ANGELES CHAPTER

On November 1, 1911, 75 Sierra Club members gathered in downtown Los Angeles to sign a petition calling for the creation of a "Southern California Section," the first local chapter in the history of the organization that John Muir founded in San Francisco in 1892. It took a while from the Sierra Club's founding to get around to the creation of

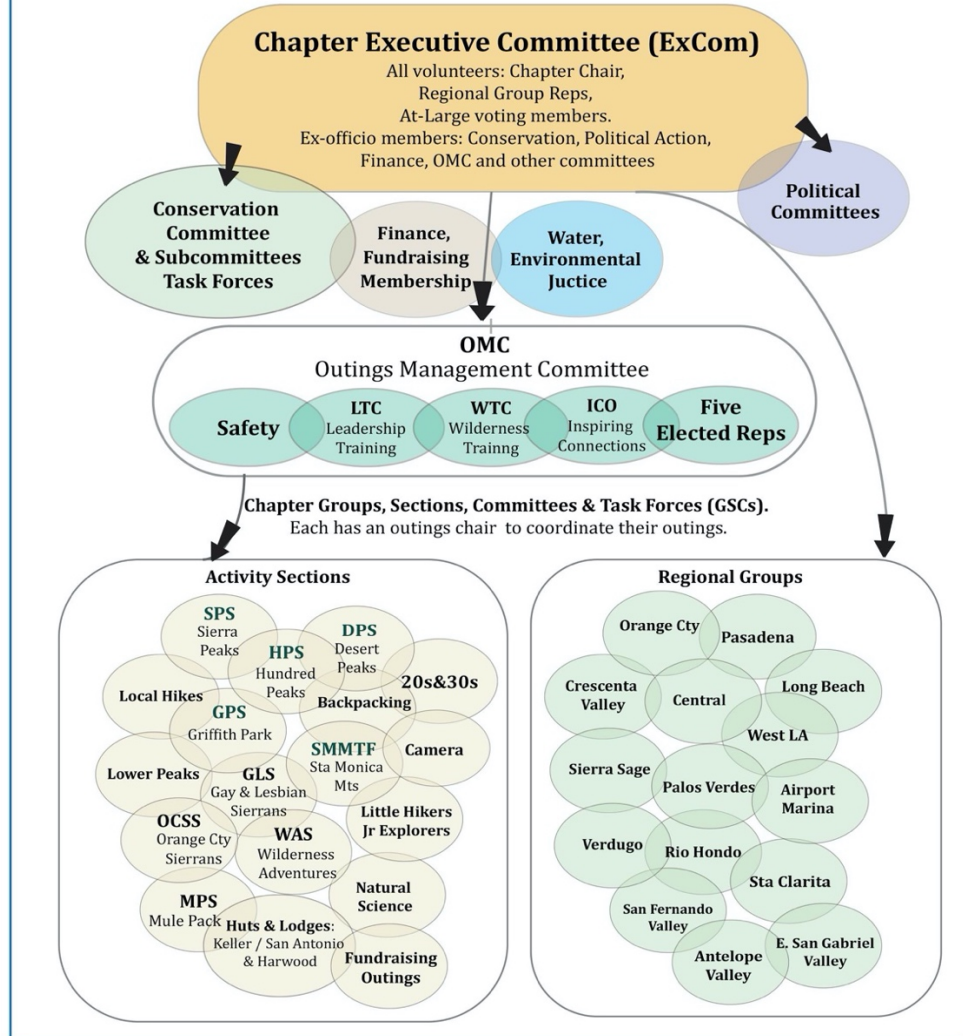
the first local chapter in 1911. That year marked the start of the Southern California Section, which became the Southern California Chapter and, finally, the Angeles Chapter, which includes Orange County and has over 40,000 members, 27+ activity sections and 15 regional groups, not to mention conservation and political committees and task forces. Today, the Sierra Club Angeles Chapter covers Los Angeles and Orange Counties.

- Includes 14 **regional groups** (organized by geographical area) and 32 outdoor activity sections and committees (organized by interest). Includes activists in Conservation and Political Action. Find out which one is yours!
- Chapter coordination and oversight is provided by an elected volunteer Executive Committee - ExCom.
- The Chapter office staff also includes volunteers and interns handling outreach, social media, phone answering, communications, and publications. The Communications Coordinator prepares publications that include print as well as e-blasts (*Southern Sierran / SoCal Now*) and those with ideas and writing skills are welcome to offer help. The Chapter roles include a treasurer and more tasks.



SIERRA CLUB ANGELES CHAPTER

Chapter Office Staff: Sr. Chapter Director; Chapter Coordinator; Conservation Program Manager.
Office Volunteers: Front Desk, social media and more



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.

Visit the Chapter website to learn more. <https://angeles.sierraclub.org/about>

The Angeles Chapter Outings Program

In a typical year, the Angeles Chapter and its entities conduct over two thousand outings each year, 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 volunteer 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 Groups, Sections and Committees (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.

A flyer for the Sierra Club Angeles Chapter Outings Program. The top left features the Sierra Club logo and the text "ANGELES CHAPTER" and "https://angeles.sierraclub.org". The title "Angeles Outings Program" is prominently displayed. Below the title, it says "Everything from beach walks to urban wanderings to local mountain hikes, climbs and trail clean ups - to desert and mountain backpacks and more...". A list of bullet points follows: "Over 2,000 outings a year.", "Activity Sections, Committees & Task Forces", and "Regional Groups do outings too". The right side of the flyer is titled "ACTIVITY SECTIONS" and lists several sections with brief descriptions: "The 20s and 30s Section", "The Backpacking Committee", "The Bicycle Touring Committee", "The Camera Committee", "The Communications Committee", "The Desert Committee", "The Desert Peaks Section", and "The Gay and Lesbian Diversity Section". Each section is accompanied by a small icon.

About Angeles Chapter 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, 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 this Leaders Reference Book (LRB), updating knowledge on the databases are all part of the OCs tasks.



OCs: See “For Outings Chairs” page on the LTC website:

<https://www.sierraclub.org/angeles/leadership-outings/resources-for-outings-chairs>



Chapter 2

2B. Conservation and Connections

Probably the most obvious way to apply good environmental practices on outings is to practice Leave No Trace (LNT) principles. See more later about LNT. Picking up trash and avoiding trampling meadows are invaluable practices. But there is more to Conservation than this one crucial aspect. We want to attract participants and inform them about work needs our attention when we go outside as well as the success stories. There is so much to be done right now...

The Sierra Club is first and foremost a conservation organization with a mission: 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 these objectives. This can range from a river or trail clean-up effort as you paddle or hike, to a free-ranging discussion of a local conservation issue and steps that individuals can take to effect needed change.

Many of the people who go on our trips do so because they respect Sierra Club's effectiveness as a conservation organization with a long history of attaining wins for the environment. Outings offer a rich opportunity to invite participants into the issues we're working on at the local level as well as issues that communities are facing all over the world. Our goal is to help make a connection between the issue and participants in order to advance conservation.

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, the Sierra Club must focus its efforts and prioritize where to place its energies at any given time and in the years to come. Accordingly, the Board of Directors periodically adopts national conservation issues for top-priority campaigns. These include policy statements on broad national issues (e.g., energy, climate change, transportation). The board also sets long-range and two-year national campaign priorities for the period of a Congress.

From climate crises to endangered wildlife and human justice issues, the task is clear and urgent for

Sierra Club members, supporters, and environmental advocates everywhere – to find ways big or small, to work together and act.

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.



- Climate & Energy
- Lands
- Air & Wildlife
- People & Justice

"From city parks to forests of redwoods, from the air we breathe to the water we drink, everyone depends on a vibrant and healthy world."

Selected Priorities, Campaigns, and Initiatives

Beyond Coal: Over 125 years of fighting have taught us that every voice, every action, matters. Now, more than ever before, grassroots efforts—whether in the city council chambers or the streets—will determine our future.

Beyond oil and gas: Protect public lands, not pipelines. We are taking polluting corporations head on to protect our health and the places we love from the reckless expansion of dirty, dangerous fossil fuels.

Sierra Student Coalition: a network of young people across the country working to protect our generation's future. We train, support, and organize youth to run effective campaigns and develop as leaders in service of movements for climate, racial and economic justice.



Explore: <https://www.sierraclub.org/explore-issues>

Our work to protect our natural and human environment continues to grow to meet the challenges we face now and that are ahead - expanding, shifting, and evolving much like our natural world. In 2021, we saw major achievements in our fight for climate justice thanks to the relentless, collective advocacy of volunteers, staff, and partners. Working together with frontline communities, Tribes, and local grassroots organizations demonstrates that we can protect nature when we catalyze people to be powerful together. Alongside our partners, our success and impact as a movement has deepened in our quest for a thriving planet where everyone and all life can flourish.

The 2030 Strategic Vision

The Sierra Club is building long-term power to conserve, protect, and create through its vision outlined in the 2030 Strategic Framework. This vision that is firmly rooted in our Core Values of anti-racism, balance, collaboration, justice, and transformation. The Framework identifies 2030 goals to address systemic challenges that are accelerating the climate and extinction crises and deepening oppression. [A sampling of goals to achieve by 2030:](#)

- Protect 30% of US lands and water.
- By 2030: Cut the nature equity gap in half by ensuring an additional 50 million people can exercise their human right to connect with the outdoors.
- By 2030: Restore clean air and water, provide affordable clean energy, support family-sustaining jobs, and address inequities in our response to climate disruptions.
- Transform our Energy System and stop the expansion of the oil and gas industry, Replace fossil fuels with clean energy

“The heritage and stewardship of our public lands, waters, and wildlife is entrusted to decision-makers at all levels of government. Yet many of these decision-makers are increasingly attempting to privatize our public resources. These assaults on our human rights - to clean air and water, access to public spaces, a stable climate, and safe communities - elevates the urgency of our efforts to become an equitable, just, and anti-racist organization.” – 2030 Strategic Framework
<https://www.sierraclub.org/2030-strategic-framework>

Angeles Chapter Conservation



Chapter Priorities

Clean Air, Water Energy Committees

- Water / Climate Action / Environmental Justice Committees

Coastal Preservation

- Banning Ranch Task Force, Ballona Wetlands, Coastal Conservation

Open Spaces and Habitat

- Santa Monica Mountains Task Force – Trail Maintenance and Outings
- Forest Committee – Trail Maintenance, San Gabriel Mountains
- Save the Puente-Chino Hills Task Force
- And more



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. Montebello Hills



Environmental Awareness is a requirement for I, M and E rating. See LTC website.

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 and campers post proof they were “there” on social media. Or they tell tales of adventure to family and friends. This is all part of spreading the “good tidings” that the Club’s founder, John Muir, famously referred to. Responsibly sharing photographs of scenic places is one way to spur enthusiasm for protecting the environment but 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.

Design a trip around a local environmental priority or in partnership with entities or local communities. To help spark your imagination, Trip Planning forms are available to help refine your ideas with or without a partner. Once you have the idea and its conservation theme, you can note the key talking points. You don’t have to deliver a lecture; in fact, that’s not always welcome on a trip outdoors unless you are a particularly engaging speaker. 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 how the “Bridge to Nowhere” was named. Invite a geologist along to point out features, or an expert on the fight to preserve a wetland or include a naturalist who can identify plants. Inspire others with a themed outing or series around a cause, issue, or related events. Consider visiting a string of parks, historic sites, navigation benchmarks, waterfalls. The purpose of an outing could also be to build specific skills or to clean up an area.

Join with a Conservation entity task force to fashion an outing around a specific local campaign or even a National campaign such as 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 you may 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 - and learn from others, all with respect.



We make a connection between the issue and participants in order to advance conservation.

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.

As a Leader, consider: What are the conservation issues in the area your trip is in?

- *Is my message of conservation optimistic?*
- *What are the conservation efforts in the area?*
- *Who is doing that work locally and what are they doing?*
- *What is the action item that you are asking participants to take?*
 - *Also see Chapter 4B. Designing, Planning and Advertising Your Outing.*

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, a land acknowledgement 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 name of the Indigenous peoples whose lands you are visiting. A longer acknowledgement 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. And, indigenous people are still here, and they’re thriving. Don’t treat them as a relic of the past.

Southern California is rich with the history and culture of indigenous peoples, from the more well-known Chumash and Tongva of the Santa Monicas to the Tataviam of Vasquez Rocks Natural Area Park. Almost anywhere we go in California, there are stories to tell that can inspire and enrich a trip that you design.

Research the following topics:

- The Indigenous people to whom the land belongs.
- The history of the land and any related treaties.
- Indigenous place names and languages.
- Correct pronunciation for the names of the Tribes and places.

How does this acknowledgement relate to the hike we are doing? What is the history of this territory? What are the impacts of colonialism here? What is your relationship to this territory? How did you come to be here? What intentions do you have to disrupt and dismantle colonialism beyond this territory acknowledgement? What actions can we each take to specifically address these issues?

“If we think of territorial acknowledgments as sites of potential disruption, they can be transformative acts that to some extent undo Indigenous erasure. I believe this is true as long as these acknowledgments discomfit both those speaking and hearing the words. The fact of Indigenous presence should force non-Indigenous peoples to confront their own place on these lands.”

Chelsea Vowel, a Métis woman from the Plains Cree speaking community of Lac Ste. Anne, Alberta

Resources for Developing a Land Acknowledgement

<https://nativegov.org/resources/>

<https://www.risinghearts.org/nativelands>

Wilderness Ethics and Leave No Trace

The Sierra Club takes 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. All leaders should follow and promote the LNT Principles of Outdoor Ethics on every outing they lead. The Seven Principles of Leave No Trace provide an easily understood framework of minimum impact practices for anyone visiting the outdoors. Although Leave No Trace has its roots in backcountry settings, the Principles have been adapted so that they can be applied anywhere — from remote wilderness areas, to local parks and even in your own backyard. They also apply to almost every recreational activity. Each Principle covers a specific topic and provides detailed information for minimizing impacts. The *LNT Principles of Outdoor Ethics* are copyrighted by National Outdoor Leadership School and Leave No Trace, Inc.

THE 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 (if safe to do so).
- 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.



Learn more about Leave No Trace: [lnt.org](https://www.lnt.org)

Environmental Awareness

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.

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. Find your own ways to incorporate these themes in your outings. A leader who freely shares their knowledge gains a lot of respect.

Chapter 1 has more details on how to achieve the credit. See this LTC page for more about LTC’s Environmental Awareness requirements: <https://www.sierraclub.org/angeles/leadership-outings/environmental-awareness>

Taking Action

When a genuine connection is made, people will want to take action. Action doesn’t just look one way. Signing a petition, making a phone call, emailing representatives, and sending out tweets are all valuable contributions. Become familiar with the Angeles Chapter’s priorities on the Chapter website. Ask your Outings Chair and other leaders about issues in places you want to visit. Our current drought conditions and recent wildfires offer opportunities to learn from experts and community members and add value to future trips.

As a Leader, Consider:

What are the conservation issues in the area your trip is in?

Is my message of conservation optimistic?

- *What are the conservation efforts in the area?*
- *Who is doing that work locally and what are they doing?*
- *What is the action item that you are asking participants to take?*



Take Action and find out more at

<https://angeles.sierraclub.org/conservation>



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DRILLING IN LONG BEACH**

69 percent complete

TAKE ACTION!

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

LTC Website: sierraclub.org/angeles/leadership-outings

LTC Admin email: ltcangeleschapter@gmail.com

Safety Committee email: 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)

Sierra Club (National) Public Website: sierraclub.org/home

Campfire Community site for leaders and staff: community.sierraclub.org.

Can access only if you have login capability. See Chapter 1 and LTC site under Resources for information on the Campfire suite of tools.

Sierra Club historical accomplishments:

<https://www.sierraclub.org/accomplishments>

Sierra Club conservation, action, and outings links:

- Sierra Club conservation policies and more: sierraclub.org/policy
- Sierra Club [land conservation](https://sierraclub.org/land-conservation)
- Sierra Club [Take Action](https://sierraclub.org/take-action)
- Our Wild America: community.sierraclub.org/section/campaigns-and-programs/our-wild-america
- National outings: 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 Archive / Vault: 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)

Angeles Chapter

- Chapter Home page: angeles.sierraclub.org
- Angeles Chapter Activity Sections here: [angeles.sierraclub.org/about us/whats your passion/activity sections committees](https://angeles.sierraclub.org/about-us/whats-your-passion/activity-sections-committees)
- LTC website Home: sierraclub.org/angeles/leadership-outings
- Chapter Outings Management on this page: sierraclub.org/angeles/leadership-outings/management
- Wilderness Travel Course: wildernesstravelcourse.org

Learn about Sierra Club Campaigns in California here: <https://addup.sierraclub.org/campaigns/1/state=CA>



Onward to Chapter 3: Outings Policies and Safety



Chapter 3

3. Outings Policies and General Safety

Several policies set the context in which outings are offered. Policies are developed by the Sierra Club National staff, along with volunteers who participate in policy committees. These policies apply to all Sierra Club outings. Local policies for Angeles Chapter are developed by the Chapter's Safety Committee. The Safety Committee along with the Chapter's Outings Management Committee monitor implementation of the policies on local outings.

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 prepares leader candidates in various aspects of leadership from technical skills to group management. 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) review the published outings 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.

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.

Classifications Overview

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.

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.

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,

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.

M-rated rock outings 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.

M-rated snow climbs 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.

E-rated rock climbs 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.

E-rated snow climbs extend 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 5th 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” or “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.

Sierra Club Forms

Forms for outings include waivers, both individual and group “sign-in sheets,” minor release forms, safety management plans, individual medical forms, provisional evaluations, emergency response - patient forms, incident reports, and more. The forms are easily accessed on the LTC website on the [Forms](https://www.sierraclub.org/angeles/leadership-outings/forms-resources) page. <https://www.sierraclub.org/angeles/leadership-outings/forms-resources>. See also *Resources at the end of this chapter.*

Liability Waivers / Sign-In Sheets

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. Minors policies are under review and will be updated.*

Safety Management Plan (SMP)

Leaders must prepare a Safety Management Plan (SMP) for all overnight trips and for all one-day trips where either 911 service is not available or advanced medical services could not attend an injured person within 60 minutes.

Frontcountry	Able to access a medical facility and/or emergency personnel in under 60 minutes (including travel back to the vehicles) or a 911 area. 911 area refers to being able to <u>both</u> call 911 and get the patient definitive care (ambulance/hospital) within an hour.
Backcountry	A term used to identify an area where one or both of these services is not available, i.e., access to a medical facility/advanced care will take 60+ minutes (including travel back to the vehicles).

The SMP presents a structured summary of resources that may be used during an emergency response. An SMP is actually recommended for all outings and for the huts and lodges that the Chapter maintains. *See the decision tree below for further information on which trips require an SMP and/or medical forms.*

Individual Medical Form

Similarly, leaders must request participants and leaders to complete a Medical Form prior to all overnight trips and prior to all one-day “backcountry” trips where either 911 service is not available or advanced medical services could not attend an injured person within 60 minutes. The individual medical form presents a summary of medical information that may be used during an emergency response. *See the decision tree below for further information on which trips require a participant 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 them considering their medical history. Depending on the nature of the trip, the form may be completed in advance or at the trailhead.

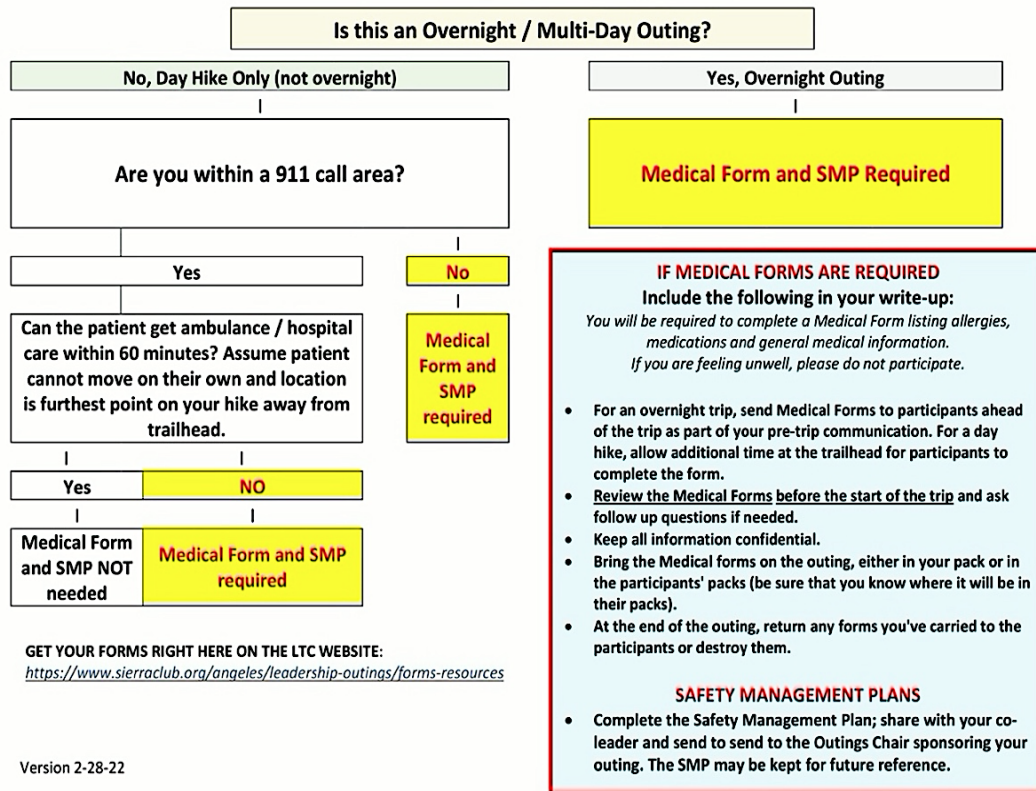
By law, medical information must be kept confidential. It should be seen on a “need to know basis” by only the trip leaders, medical personnel, or others who know and understand its confidential nature. For mountaineering trips (i.e. trips classified as MR or ER), the medical form will be retained along with the participant’s liability waiver for a period of time following the trip, after which it will be destroyed. For all other trips, the medical form will be returned to the owner or destroyed at the end of the trip. If the participant chooses not to go on the trip, this form will be destroyed immediately. 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 and in others, accommodation could be made.
- Knowing a participant’s prior medical history can help you determine whether this trip is appropriate for them. 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.

When do I need Medical Forms and a Safety Management Plan ?



IF MEDICAL FORMS ARE REQUIRED

Include the following in your write-up:

*You will be required to complete a Medical Form listing allergies, medications and general medical information.
If you are feeling unwell, please do not participate.*

- For an overnight trip, send Medical Forms to participants ahead of the trip as part of your pre-trip communication. For a day hike, allow additional time at the trailhead for participants to complete the form.
- Review the Medical Forms before the start of the trip and ask follow up questions if needed.
- Keep all information confidential.
- Bring the Medical forms on the outing, either in your pack or in the participants' packs (be sure that you know where it will be in their packs).
- At the end of the outing, return any forms you've carried to the participants or destroy them.

SAFETY MANAGEMENT PLANS

- Complete the Safety Management Plan; share with your co-leader and send to the Outings Chair sponsoring your outing. The SMP may be kept for future reference.

Emergency Response–Patient Report

In the event of an emergency that requires or may require 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 and Chapter 5 on First Aid.*

Mountaineering Forms

Mountaineering outings and watercraft outings falling under the “restricted outings” category require special forms. Differences include the need for participants’ membership number on the waiver. Other differences may include the type of medical form. Participants and leaders should provide two copies of the Medical Form. This form can be used as part of the evaluating 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 and/or suggest that the participant consult with their physician regarding their ability to complete the trip as described.

Incident Reporting

An Incident Report must be filed whenever an accident or incident occurs on a Sierra Club sponsored activity. Use the approved e-form available on the LTC web site or as advised by the Safety Committee. 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 an extremely serious injury or fatality or any evacuation, the national Sierra Club office must be informed immediately after appropriate first aid and coordination with 911, local sheriff, or proper responder. 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.”

Serious 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.
- Any instance of Covid-19 illness or positive test

Minor Incidents or Near-Misses

- 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 or disruptive behavior
 - recurrence of a prior condition; someone with a prior injury, heart, or respiratory condition.

Leaders should carry a copy the incident e-form on the hike for reference. Memories fade rapidly, particularly under stressful conditions. Note that it is preferable to submit reports for seemingly minor events rather 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. Use the online platform to submit the report.



Instructions and a downloadable version is available on the Incident Reporting page on the LTC website: <https://www.sierraclub.org/angeles/leadership-outings/incident-reporting>.

The Outings Rules of Conduct

The Rules of Conduct are to be visible to the public and shared with participants. They give the outings leaders the authority to conduct the outings and manage the group safely and responsibly. 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. And the list may be updated in the near future.

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. Carrying a cell phone is advised, but the cell phone is not a substitute for the safe conduct of the outing, nor for the leader's ability to manage an emergency. See Chapter 4, section 4E, [Risk Management and Emergencies](#).

See this page which will show updates to our Outings Rules of Conduct as they are approved.

<https://www.sierraclub.org/angeles/leadership-outings/rules-conduct>

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. These Rules are under review.

- ❖ **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. *{Support of these principles encourages participants to respect and protect both the human environment as well as the natural environment.}*
- ❖ **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 {evaluating} in advance of the trip. Other trips may simply ask participants to {evaluate} 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. *Current forms and information on Minors on your outing can be found on the LTC Forms page and are under review.*
- ❖ **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 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.**

Ensuring an Inclusive Environment

The Sierra Club has taken a deep look at its policies on harassment, discrimination, and bullying, which, along with its Affirmative Standards of Conduct, have come to more firmly align with the Mission and Core Values grounded in equity and inclusion: Antiracism, Balance, Collaboration, Justice and Transformation. *See Chapter 2 for discussion on the Sierra Club's Mission, Core Values and Equity Goals.*

To support Sierra Club's Mission and be consistent with Sierra Club's Core Values and Equity Goals, the Sierra Club adopted an [Equal Opportunity Policy \(EOP\)](#) in 2021. (See *Chapter 3 Resources*) This EOP includes a commitment to "equal opportunity and to creating and maintaining an equitable and inclusive environment." The EOP addresses volunteers, staff and partners. The Sierra Club's Affirmative Standards of Conduct, as well as the Angeles Chapter's Rules of Conduct, compliment the EOP and states that Sierra Club volunteers are responsible and will be held accountable to meet the affirmative standards of conduct, and to hold other leaders and volunteers accountable to them as well, in all Sierra Club interactions with others.

People who participate in outings all have a voice and may choose to contribute during the outing. Leaders and members of the Sierra Club have the responsibility to abide by the Sierra Club's affirmative Standards of Conduct and hold others, including participants, accountable for their conduct. The Angeles Chapter Rules of Conduct applies 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.

With respect to outings and per the EOP, Sierra Club volunteer leaders and staff have an obligation to resolve violations of the affirmative standards of conduct or actions constituting misconduct quickly and decisively. Resolution should be achieved at the most local level, and informally whenever possible, subject in each case to Sierra Club's legal obligations to respond to and potentially report such misconduct. Each leader has the responsibility to uphold these standards.

The Sierra Club also encourages staff, leaders and partners who collaborate with the Sierra Club to educate themselves about the ways unconscious (implicit) bias may color their perceptions and experiences of a situation and to do what they can to mitigate or correct for those biases. [More on bias in Chapter 4.](#)

Sierra Club's EOP policy prohibits "any form of inappropriate, bullying, harassing, or other discriminatory behavior ("inappropriate behavior"). While this policy is encompassing, there are links within it to other, more detailed documents that include definitions for those components covered by legal standards, i.e., discrimination, sexual harassment.

The Sierra Club believes that all people, regardless of disability or illness, not only can and should be able to enjoy the outdoors but also can and should be valued members of our organization. Sierra Club will comply with all applicable provisions of the Americans with Disabilities Act ("ADA"). It is our policy to not discriminate because of an individual's disability or perceived disability. Consistent with this policy of nondiscrimination, Sierra Club will provide reasonable accommodations to a qualified individual with a disability, as defined by the ADA, who has made Sierra Club aware of their disability, provided that

such accommodation does not constitute an undue hardship on the Sierra Club.

Per the Americans With Disabilities Act, the following will be considered for outings (*see also [Chapter 4: Evaluating participants](#)*):

1. Reasonable Accommodation: Can the person take part in the outing without the Sierra Club incurring excessive cost, or expending excessive effort to support participation?
2. Safety: Can the person take part in the outing without endangering themselves or others?
3. Fundamental Nature of Outing or Activity: Can the person take part in the outing without fundamentally changing the nature of the activity?

Defined Behaviors

Harassment

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.

Sexual Harassment

Specific forms of sexual harassment include the following:

- 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.
- Verbal abuse of a suggestive nature: commentary about an individual’s body, sexually degrading words to describe an individual, or suggestive or obscene letters, notes or invitations; and social media posts.
- Visual abuse: displaying {and sharing} sexually suggestive objects, pictures, cartoons, posters or cartoons of a sexual nature.

Bullying

Written or verbal behavior (including e-mail or text communications), such as ridiculing or maligning a person or their family; persistent name calling which is hurtful, insulting or humiliating; using a person as the target of jokes; abusive and offensive remarks. Other examples:

- Gestures, such as: non-verbal, threatening gestures, insulting gestures, eye contact that conveys threatening messages.
- Physical: such as pushing; shoving; kicking; poking; tripping; assault, or threat of physical assault; damage to a person’s work area or property.

Toxic Behavior

Toxic behavior manifests in verbal and non-verbal subtle abuses of power. Examples include yelling and/or making threats towards others, (ii) toxic humor based on reinforcing stereotypes and/or associated with historical or social oppression, (iii) domineering, including constant interruption or talking over others, (iv) tokenizing, including asking people to perform duties exclusively based on their identities or assumed identities, and (v) Microaggressions, including commonplace daily verbal, behavioral or environmental slights, whether intentional or unintentional, that communicate hostile, derogatory, or negative attitudes toward stigmatized or culturally marginalized groups.

Behavior on Outings

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. Neither should any participant feel preyed upon, harassed, or discriminated against by the leader. As ambassadors of the Sierra Club, we are making that personal commitment to uphold the Affirmative Standards of Conduct. We model good behavior for our participants who generally need to follow the Outings Rules of Conduct. Several avenues are available to a person who feels that they are a victim of harassment, sexual or otherwise. *See Complaints below.*

Conflicts and 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. Contact: 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 resources. sierraclub.org/angeles/leadership-outings/rules-conduct.

Handling Conflicts and Complaints

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 – and without escalating – the situation.

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 a participant unhappy with the way a trip went? Objecting to a route? or a refund problem? or is it behavior? not following the leader? Violations of the Rules of Conduct are rare and sometimes merely misunderstood. Was your advertisement clear? Did you specifically allow dogs?

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).

You can take a person aside and discuss the issue in private. A private low-key conversation is better and less dramatic than 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. If you are in a teaching or instructing position (e.g., training event) remember that using your authority alone can help, but also requires careful handling.

Handling After the Outing

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 "Addressing 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 may be useful, especially in determining whether the complaint needs to be shared with the Chapter or Sierra Club HR.

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 on the sign-in sheet/waiver.

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
- 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.**

Additional Safety Considerations

Cancelling an Outing

Most Angeles Chapter outings 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. 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 cancelled.

When a trip is cancelled for any reason, it may be rescheduled as an official Sierra Club trip as long as

the Outings Chair and Safety Committee are notified with enough time to review based on the new date. *See also about [Campfire Events](#) in Chapter 4 and on our LTC website under Resources.*

A planned trip cancelled at the trailhead cannot be led as a “private trip” since it would still be recognized as a Sierra Club sponsored outing. **Outings cancelled before participants leave home may be reorganized as private outings because participants would have a reasonable opportunity to decide whether or not to participate given the new condition.**

A Word About Bus Trips

Bus trips are a type of leader-arranged transportation during which a charter bus company provides both vehicles and professional drivers to transport participants, leaders, or equipment. The leader is responsible for ensuring the following that the company signs a Concessionaire Agreement. A certificate of insurance must be furnished to the Sierra Club by the company, naming the Sierra Club as additional insured." Leaders and Outings Chairs interested in conducting bus trips should contact the LTC and the Safety Committee for the most recent guidelines. Campfire Community pages will also have information.

Unstructured Time on Overnight Outings

Whether your trip is a backpack or car camp or lodge or other type of overnight trip at any rating level, unstructured time on trips can be a positive addition to any itinerary, so long as it is managed, and expectations are set according to conditions and group aptitude.

All Sierra Club hikes done from a car or base camp must have two appropriately rated leaders. Activities that are not official, defined as “unstructured” or “free time” are allowed, but here are some things to consider: Both legally, and practically, there are no true ‘free days’. We are ultimately responsible for the well-being of participants at all times on the trip. The idea that they are ‘off-trip’, only increases risk for everyone, and makes leaders responsible for what they have no control over.

Leaders should be comfortable managing the safety, logistics, group management, and potential emergency response of any activity at all times. If you are not comfortable with it, don’t allow it, because we are ultimately responsible for it. If a participant is opting out of an activity element (day hike, day of service work, etc.) they cannot “sign out” for the day (by signing the liability waiver.) As the leader, you should review the guidelines above and linked in Resources for how to structure the participant opting out and have a plan for how to manage this situation.

Lost Persons



At the trailhead or start: 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. Searching will not begin (or resume) until a time that is safe to do so, usually by 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 most instances the terrain is unfamiliar, even hazardous, and a probable result would be additional people lost or injured

Knowing in advance that a night search will not be undertaken, the participant can settle down for the night and make the best of the situation. The participant may not be lost. The participant may just be caught some distance from camp or a trailhead as darkness falls.

In any event, the participant will understand, that several hours of daylight will be available for them to reach camp or trailhead if they are able, before a search will be initiated.

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.

Sierra Club Insurance

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 Evaluating Participants in Chapter 4.

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. *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 or the Chapter on how to do this.

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 Sierra Club immediately. Leaders should report threats of litigation as well as actual notice of suit. To report, you can consult with the Chapter. See Contacts at end of Chapter 2. Sierra Club entities (GSCs) 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.

The Angeles Chapter Safety Policy

THE COMPLETE ANGELES CHAPTER SAFETY POLICY

Approved by Angeles Chapter Executive Committee 7/26/2020

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 greater than class 3 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 Campfire Events 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 Campfire 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 Campfire; no archiving shall be required for outings published on Campfire.

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 Campfire.

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 Campfire Events 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 Campfire 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 Campfire), a hard copy of the announcement shall be archived for the seven-year period.

Social media

After publication in Campfire 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 Campfire 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 that is valid within the dates stated on the certificate or card.
- 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.

Epi-Pens

An outings leader may seek approval from the Safety Committee to carry and use an

Epinephrine Auto-Injector on a Chapter outing. To do so, the leader shall present to the Safety Committee a copy of the California Epinephrine Auto-Injector Certification Card. Approval will be given only to use an Epinephrine Auto-Injector in accordance with Health and Safety Code Section 1797.197a and the Sierra Club's Anaphylaxis Protocol. The leader is personally responsible for purchase and maintenance of the Epinephrine Auto-Injector.

Waiver and trip management

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.

Chapter 3 Resources

- **Forms:** LTC website under Forms: sierraclub.org/Angeles/leadership-outings/forms-resources
- LTC pages on Safety Committee and Incident Reporting.
- sierraclub.org/angeles/leadership-outings/angeles-chapter-safety-committee
- Safety Committee email: safecomm@angeles.sierraclub.org
- OMC Chair: omc@angeles.sierraclub.org
- The Equal Opportunity Policy (EOP) is linked on our [LTC website LRB page](#)
- Minors page in Campfire Community ([requires Campfire login](#)). Ask us about this topic if you cannot access. <https://community.sierraclub.org/section/capacities/finance-operations/event-guidelines/minors>



Onward to Chapter Four:
Outings Leadership in four parts

- A. Leadership Qualities and Ethical Leadership
- B. Trip Planning: Designing, Planning and Advertising the Outing
- C. Participants
- D. Conducting the Outing and Group Management
- E. Risk Management and Emergencies



Chapter 4

4. Outings and Leadership

In Chapter 1 we learned about becoming a leader for Angeles Chapter. In Chapter 2 we learned about Sierra Club values, equity, and conservation goals. In Chapter 3 we learned about the importance of safety on Sierra Club and Angeles Chapter outings. Now we are about to cover a lot of ground in Chapter 4 which is why we have divided this into subchapters. You'll learn about qualities of leadership as well as insights on designing, planning, advertising, and leading most of our trips. Alongside the LTC website, this chapter is a resource for leading trips even after you've achieved a rating. It also discusses the "softer" skills of evaluating participants, group management and more. Included here is accumulated wisdom from very experienced leaders alongside current concepts on ethical decision-making. Also included are Checklists at the end of Chapter 4. More than ever, we as outings leaders are striving to align the Sierra Club mission with the nominal and personal objectives of our outings.

This chapter is divided into sections as follows, with hyperlinks:

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- A. [Leadership Qualities and Ethical Leadership](#)
- B. [Trip Planning: Designing, Planning and Advertising the Outing](#)
- C. [Participants](#)
- D. [Conducting the Outing and Group Management](#)
- E. [Risk Management and Emergencies](#)



Wilderness Adventures' Wilshire Walk, 2018



Chapter 4

4A. Leadership Qualities

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. This section of the LRB discusses ethics, decision-making and styles of leadership.

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

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 that you'll lead.
- Planning and problem-solving skills which can look different among each of us.
- Confidence and decisiveness, supportiveness, and approachability
- The right specific or technical knowledge for the type of trip
- Awareness of ethical decision-making and capability of demonstrating the best and current leadership standards that reflects well upon themselves, the Sierra Club, and the outings community.
- Collaborative, aware of transformative relationships: the two (or more) leaders of an Angeles Chapter outing need to work well together. Collaboration can also include reaching out to partnering entities to engage in outings that support shared issues that are relevant to Sierra Club's Mission.

An effective leader is a confident leader who understands how to make decisions that consider the group's needs. Alert for the early signs of attitudes and actions of specific members of the group (running ahead, lagging behind, bravado, excessive competition, groundless fears, inexplicable exhaustion, unusual irritability, or incessant complaining), the leader, possibly in consultation with the

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.*

co-leader, can find ways to avert trouble. See [Group Management](#) later in this Chapter.

Ethical Leadership

When participants join a Sierra Club trip, they are expecting leaders to be able make tough decisions. All the training, provisionals and first trips that leaders do will help shape the types of trips they'll lead and their comfort level with being a leader. A key part of this training is Ethical Decision-Making, a process that flows through all the steps to design, plan and conduct an outing. Ethical Leadership is an intentional values-based thinking and decision-making process. Its foundation is our awareness of Sierra Club values and commitment to equity goals. See *Chapter 2A*.

Ethics isn't just about what is good, it's also about what is right. How we design and advertise the trip involve decisions; so does how we describe expectations and requirements; how we evaluate and interact with participants. At the start and during the trip, more intricate decisions can present themselves, which can test our leadership capabilities.

Ethical Decision-Making

Example. During the trip design phase: gather information to help you decide on your plan, then keep an open mind, ask open questions, and distinguish facts from assumptions. Consider the challenges of your plan and ask yourself how you will manage those challenges, and who / how to ask for help. Creating your Safety Management Plan (SMP) helps with the practical aspect of meeting challenges, but there are emotional and psychological aspects, too. See *Chapter 3 about SMPs and more in this chapter*.

Some Ethical Leader Beliefs:

1. Our purpose is to create value for others. When we reflect on our purpose as leaders, we realize that we are here to create shared value that benefits multiple constituents.
2. How we treat people matters. Leading with respect, care, service, and inclusion is transformational.
3. We must take responsibility. Taking responsibility for using ethical thinking and decision-making will change everything we do. It will help to build high-trust relationships.
4. We need to be proactive. Being proactive means taking the initiative to learn; examining our choices carefully; and creating a culture where ethical behavior is expected. We cannot be reactionary leaders.
5. We will embrace the learning journey. We will never know all there is to know. As individuals and an organization, we are always growing and evolving.

The more you use this process the more it will become second nature when situations arise.

Leadership Roles and Styles

Outings are primarily a group activity with many traditionally opposing elements: structure versus flexibility, adventure versus safety, cohesion versus individuality, personal security versus growth, goal versus process, and others. Rather than treating these as binary extremes, either/or, the leader can be the "balancer" who is attentive to each "side" when needed. As you develop your style, consider the various expectations of participants.

Survey results from hundreds of outings show that participants expect leaders to be good at organizing and planning; be self-confident and competent in leading them on the right trail or route; make good decisions; be trustworthy; communicate well; be caring of people; 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; 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 roles and styles:

Equals/Peers. In many circumstances, particularly private trips, participants are nominally equals and have comparable 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. 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. The designated outing leaders need not be the most knowledgeable persons.

Guide / Autocrat. 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. *Sierra Club outings leaders are not guides, although 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."*

Three Leadership Styles

Within the roles outlined above, there are leadership styles that can apply to different circumstances. Style can be an interplay among needs in the moment: how much direction you give along with how much support you need to provide in any situation. Which leadership style do you have? When might you need to change that style?

1. Autocratic

Leader-centered decision-making. Used for inexperienced and new groups and dangerous/emergency situations. Since the future activity is unknown to participants, the leader often dictates particular work tasks and assigns work companions.

2. Democratic

Participant-centered decision-making. Best for non-emergency, low-risk decision making. Since decisions are based on all members in the group, the leader guides/facilitates rather than directs. This process takes a lot of time, so the leader needs to make sure that this decision-making process is appropriate.

3. Laissez-Faire

Neither leader nor participant centered. Best for safe and low risk situations, competent and formed

groups and situations where the leader is ok with the decision a group will make. This style is best left to high functioning groups and you as a leader should be fine with any decision the group will make.
NOTE: someone usually steps into a leadership role welcomed or not.



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.

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 leadership style to achieve the goal of inclusion. It can begin with sign-up confirmations, but it really gets going with introductions at the start, the trailhead. 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 to share why everyone is here and reach consensus on creating a safe space for all group participants 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. *See the Safe Space Agreement on the cover page; See also About the Pre-Trip Briefing / Trailhead Talk in this chapter and Chapter 3 on Ensuring an Inclusive Environment.*

Chapter 4

4B. Trip Planning



Whether you are designing an urban exploration or a beach excursion or mountain adventure, Sierra Club Outings reflect Sierra Club's commitment to common values. Reducing barriers to participation, whether they be social, financial, physical, or perceived, will continue to be a goal that supports getting our participants into and in touch with nature. The success of this effort to "explore, enjoy and protect," relies on designing trips with core values, conservation goals and best leadership practices in mind. You, as the leader, are responsible for *safely* achieving the published goals of your trip.

Research. Research. Research. Time will be well-spent researching as part of designing your trip.

General Trip Planning Guidelines and Reminders for Leaders are summarized on this page:

<https://www.sierraclub.org/angeles/leadership-outings/trip-planning>

Designing and Planning the Trip

Sierra Club leaders plan trips they enjoy but they need participants to join them. They are not designing a trip just for themselves as much as they are designing it for (and often with) participants. After all, a Leader is there to facilitate the trip experience for others.

Who What Where Why

The activity you do and the places you go will greatly depend on the population with whom you go outside. Do you have a specific group of people in mind or are you designing a trip for a general population? Do you expect your participants to be beginners, experts, in-between?

Expand your pool of participants by seeking partnerships. Partner with other Chapter groups, sections, and committees (GSCs) by co-sponsoring, or with outside partners and communities. This way you can find new people to get outdoors with and introduce to your favorite places. Reaching out more broadly will help build outings, ensure all people have opportunities to explore and enjoy nature, and inspire and empower a new generation or cohort of leaders to protect the environment.

Who are the leaders? If you are a provisional leader, see Chapter 1 on choosing an Assistant / Evaluator. Are you a rated leader? Consider what skills and knowledge your co-leader may bring to the trip. **Who will work with you to design and publish the trip?** First up would be your sponsoring Outings Chair. Next would be your assistant or co-leader or other leaders you have met.

What do you want to do on the outing? Explore a waterway? Discover spring wildflowers? Hike to the top of a peak, walk or bike around an urban park?

Where do you want to go? A favorite park? someplace new? a series of lakes in a wilderness, or just a great vista point in the local mountains or a spot along the LA River. Another state? Farther away?

Why do you want to do this trip? Visit a landmark or an area impacted by fire or pollution? Maybe just provide an opportunity to improve conditioning (stair hike?) ? or get a peak on a “list”?

Defining a Purpose

Your trip may start with a desire to explore a new area – or stay close to home. You can expand the idea by considering a community; make use of accessible places and sensory parks for people with hearing or vision loss. Build an outing around a local or regional event or a holiday. Create something around a significant historical event or environmental issue that others care about already or can be persuaded to care about. Craft an outing around your interests or knowledge (history? geology? famous residents?).
See Chapter 2B Conservation and Connections.

Trip Planning and Safety Management Form

This is a form that is introduced previously in chapters one and three. The safety aspect is on one side and the other contains information about the trip and a reminder to have a purpose in mind. The purpose and activities description can just be in your full advertisement, but here it acts as a reminder of points to touch on and what research is needed (weather, conditions, issues, etc.)

Potential Collaborators

- Your group / outings chair / management / other leaders
- Another Sierra Club entity such as conservation, political, or other.
- The participants or a partner organization. You might even want to survey participants who have been on your past trips and ask what they might like to do and where they want to go.
- Survey your community to learn from folks who have never been outside with Sierra Club about what would interest them.

- People impacted by environmental injustices in a specific place
- Naturalists and other experts to help plan trips that are educational and informative.



General guidelines for leaders to help with trip planning can be found at:

<https://www.sierraclub.org/angeles/leadership-outings/trip-planning>

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. *See Checklists at the end of Chapter 4*

Overnight Trips

Overnight trips for Angeles Chapter outings can be a backpack at the O-2 level and above. Some are base camps or lodge trips where several destinations are part of the itinerary. Some are car camps. Some are mule packs. *See Chapter 3 policies on and consult with your Outings Chair.*

For overnight camping trips you'll need to consider campsites. Will you be camping in a campground, or looking for suitable tent sites on a backpacking trip? You will need to become familiar with the camping rules including permits, food storage, bear boxes and canisters for the area you are going into.

Will there be enough space for the number of participants you are 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? **No matter where you camp, remember to keep LNT ethical principles in mind.** *See Chapter 2.*

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 Geronio, San Jacinto, and Cucamonga. Example, for San Geronio, go to <https://sgwa.org/wilderness-permits/> and you'll see instructions on making a reservation and then downloading the permit.

Applications for wilderness permits are obtained through the [Recreation.gov](https://www.recreation.gov) website. You'll need to create an account and take it from there. Rules change from year to year, but head count limits are imposed in most areas in a large portion of each year. 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. For trips into National Parks, particularly Yosemite, you may need to consult with our Chapter's Outings Management.

Inyo Forest permits: <https://www.recreation.gov/permits/233262> "Permits are required year around, but various factors determine which permits you need and how to acquire them." Some areas require only fire permits (check campfire restrictions and fire dangers), which also cover camping stoves. You can get your campfire permit online here: <http://www.preventwildfireca.org>.

Scouting the Trip

As part of planning a trip, a leader should scout the trip ahead of the date, 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. Please carefully review land agency or owner requirements for outings leaders and participants prior to visiting the site.



Review your Safety Management Plan. See [Chapter 3](#).

Writing Up and Advertising Your Trip

When you look at a Chapter or group/section/committee website, you will most likely see a “feed” from the online publishing tool, Campfire Events. The outdoor activities displayed are input by your outings chair, or even by leaders – and eventually by YOU. *See more about Campfire below.*

The Basics

To create an effective write-up, you’ll want to have several details ready:

Trip Rating (O-1 or 2, I, etc.). Trip Title. Date(s) and Time. Level (difficulty). Costs (if any). Description. In person or virtual. Meeting Place. Leader’s names, contacts. Registration information (if applicable). After these details are established, the rest is creating an inviting and inclusive description.

The Description

Create a description that truly gives a picture of the trip and expresses its purpose. You are enticing as well as informing people, so be imaginative but honest about what they can expect. This way, participants can assess whether the trip is right for them while they savor the thought of going there. How you write, or what photo you might include gives them a “feel” for your outing and your leadership style. Give enough detail so potential participants can determine if the trip is a good match for them. What should they expect? Could you suggest an alternative if they want to go, but aren’t ready for it? Could you make any accommodation for them (e.g., supply extra gear)?

- Include enough detail about difficulty: steepness, pace, etc. Note unusual situations. Cross-country and terrain type should be noted.
- Use terms like “easy,” “moderate,” “strenuous” or in-between, but add more detail about why.
- Use language that is straightforward, concise, and easy to understand. Use welcoming and clear language. Avoid “jargon” and use of vague or exclusive language (such as “lugssoles,” “no tigers,” “X/C”, “split break”, “happy hour,” “SASE.”)
- Prerequisites for participants (experience, conditioning, gear)
- Mileage: Usually roundtrip - 12 mi (miles there and back). Gain: example 3000’ (feet) gain. Do not give loss unless different than gain. Give gain on return if significant.
 - Consider writing out words in the full (long) description to make it easier for all to read and understand (example: 1,000 feet gain instead of 1,000’ gain).
- Provide Sign up instructions and restrictions
- Provide alternative transportation information.

- 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 (e.g., “not for beginners,” and any challenging sections of a route.
- Campfire Events allows both a short description (for hovering over an entry to get a glimpse of the trip on a website) and a full or long description with all the details.
- Want to know more about equity language? With Campfire login access, you can review the [Equity Language Guide](#) (also on our LTC website Trip Planning page).

This and That Language

Which is easier to understand? This? Or That? (“hairy” trail and “mess kit” may require a dictionary)

THIS	THAT
The trailhead is a short 15 minute walk from the 32 nd Street stop on the #9 bus line.	The trailhead is 1-mile southeast uphill, traveling along Curtis St. off the 32 nd street stop on the #9 bus line.
We’ll be car camping and each participant is required to bring their own mess kit.	We’ll be car camping and each participant is required to bring their own cookware to prepare their meals as well as bowl/plate & utensils.
This is a pretty hairy trail so it’s recommended that you be a seasoned hiker.	This trail has a narrow section with hand cables that lasts for 3 tenths of a mile with a width of 6-8 ft and 100 ft drop-offs to the road below.

Other Information for the Write-Up

- 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 leaders never arrange carpools, just provide contact information and meeting point.*
- Restrictions and caveats: activities requiring reservations should include any space limitations, deadlines, requirements for experience, contact information, fees, or other requirements.
- Contacting you: advise participants to be clear in subject line of their email, i.e. “About Your Trip” is not clear; they should put trip title in subject line. Remind them you may have a wait list.
- Rain cancels or postpones - include this your notice in the description.
- 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!
- 10 Essentials. Some of your participants may not know what the 10 Essentials are. Provide a link and explain. *See the end of Chapter 4.*
- *The write-up for a restricted outing should include the fact that only Sierra Club members may participate, unlike most other Sierra Club outings.*

COVID-19 / Communicable Diseases Precautions




As of August 2022, guidance on COVID-19 protocols continues to evolve.

LTC's [Trip Planning and Forms](#) pages will contain up-to-date information as best we can. There are statements you will need to be aware of regarding vaccinations (on a day hike you may be with vaccinated or unvaccinated people) as well as participants making a leader aware of positive tests within 5 days of an outing. Ask your Outings Chair and us. See Contacts, end of Chapter 1 and on LTC website.

Campfire

Campfire is a suite of tools for engaging with the Sierra Club: Campfire Events, Community, Learning and more. Campfire Events is viewed by the public via the [Schedule of Activities](#) page on the Angeles Chapter website and via entity websites. Familiarize yourself with how events appear in the chapter schedule. Note that there are several “views”: List, Map and Calendar. To access Campfire and input your event, you must be a Sierra Club member. The public sees the published results. Click on various events to compare; you may even see longer entries that include photos.

Campfire



Jane Simpson ▾

Welcome to Campfire

The tools you see on this page correspond to the leadership roles you hold within the Sierra Club. May these resources help you Explore, Enjoy, and Protect the planet!

<h3>Campfire Community</h3> <p>Community</p> <p>The Sierra Club's intranet, resource hub, internal news stand, conference table, and community space where we can find people, make connections, and access materials that help us do our work. Support: campfire.community@sierraclub.org</p>	<h3>Campfire Events</h3> <p>Events</p> <p>The Campfire Events tool helps you create events, manage registration and record attendance while saving your time and streamlining your activities. Support: campfire.events@sierraclub.org</p>	<h3>Campfire Learning</h3> <p>Learning</p> <p>Campfire Learning is Sierra Club's learning platform for dynamic self-paced learning and training. The course content is constantly expanding and growing to meet the needs of our learners. For questions reach out to learning.help@sierraclub.org</p>
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Campfire Events

Access to the Campfire suite is for members with a defined role. First time outings candidates will access Campfire as a “Leader Trainee.” Your ability to access and enter an outing in Campfire Events depends on your entity (outings chair) giving you “permission” to do so by adding you as a trainee, or 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. For non-outings, you just need to be a member affiliated with a sponsoring entity.

Training and access to Campfire Events is available here:



sierraclub.org/angeles/leadership-outings/campfire-events-training

A few key points about Campfire

- Unfamiliar with databases? Read the training materials first, then ask your outings chair who can ensure you have access, and 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. Chapter and 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. Select yours, however, not just the Chapter.
- Select "In Development" while you are gathering, entering & saving 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 – and an automatic email is sent to the Safety Committee for a review.
- 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!** You should make the trip yours and display your own writing skills and make sure that details are correct. *If you borrow someone's well-written description or catchy phrases, consider asking the writer first and maybe giving credit. Contact the LTC webmaster, OMC Chair or LTC Admin with issues that your outings chair can't answer.*

Online Registration in Campfire

You may want to use the online registration function in Campfire Events. Review our Campfire Training page where you'll find information on using this function. Provisional Leaders: Consult your Outings Chair first. Online Registration is evolving and has many useful features that can streamline the process. such as questions you can ask participants. A few limits exist, however, especially for trips requiring more approvals. LTC admins can also help you and advise you if your trip would benefit from using it.

A Few Advertisement Examples

Read how COVID-19 is impacting our activities. [LEARN MORE](#)

SIERRA CLUB
ANGELES CHAPTER

I: Thousand Island Lake/Mt. Davis (12,303')


Date and Time:
Sun, Aug 14, 2022, 8:00 AM (Local Time)
Tue, Aug 16, 2022, 8:00 PM (Local Time)
(Date & Time are tentative)

[Add to Calendar](#)


Organized By: Angeles Chapter Wilderness Training

Location: MAFW-481 Mammoth Lakes, CA, USA

[Map & Directions](#)



Event Organizers:



Starting Sunday from Agnew Meadows near Mammoth Lakes, enjoy magnificent views of the Sierras, Mt. Ritter and Stanley Peak along 8 mi, 2000' gain high trail portion of PCT en route to camp at Thousand Island Lake (12,303') in the Ansel Adams Wilderness. Monday rises 2 miles country route to Mt. Davis via North Glacier Pass, 8 miles round trip and 2500' gain. This will be a long strenuous day crossing boulder and gravelly snow fields. Tuesday pack out 10 mi via JMT and Shadow Creek Trail. Priority given to 2022 WTC audubons.

Level: Strenuous

Signup Restrictions: You will be required to complete a Medical Form listing allergies, medications and general medical information. If you are feeling unwell, please do not participate.

Read how COVID-19 is impacting our activities. [LEARN MORE](#)

SIERRA CLUB
ANGELES CHAPTER

O: Bolsa Chica Ecological Reserve Hike
Date: Sept 30, 2022
Level: Easy

Easy paced, reasonably flat, 5-mile hike, approx. 3 hrs. Newcomers Welcome. Enjoy the natural beauty of Bolsa Chica, land of the Acjachemen and Tongva, one of the last remaining wetland ecosystems in Southern California. No matter how many times you visit the Bolsa Chica, there is always something different to see or learn. Meet 8:30 am. From Warner Avenue in Huntington Beach turn south on Bolsa Chica Street to the end of the street and trailhead (Brightwater Drive). Park on the street. Bring camera, water, sun protection, hat, light hiking boots, rain does not cancel. Arrive early for parking in this ecological reserve. No dogs; no restrooms. Vaccination is not required to participate. Anyone can wear a mask if it makes them feel more comfortable. If you are not feeling well, please do not participate.

I: Pilot Knob (12,245')
Date: August 6-8, 2022
Level: Strenuous

Join us for this moderate three-day backpacking trip into the gorgeous Humphreys Basin west of North Lake in the Eastern Sierra Nevada. Friday we'll meet near North Lake (9,345') and pack in at a relaxed but determined pace west along creek side trail up past a series of gorgeous alpine lakes to, and then over, Piute Pass (11,425') before dropping down into the spectacular Humphreys Basin and making our way north to our camp for the weekend near the SW shore of Desolation Lake (11,400'). Expect a day's total of about 7.5 miles with 2,600' gain. After setting up camp, relaxing a bit, and perhaps catching a fish or two, we'll settle in for a festive Happy Hour under waxing gibbous, summer night skies. Saturday we'll head off cross country first to the north for a pleasant stroll up to the summit of nearby Four Gables, then back to the south and then west past a series of small lakes followed by a steep ascent to a saddle and then west to the summit of Pilot Knob...

Signup Restrictions: If you are feeling sick or have been exposed to someone who has recently (within the past 10 days) been sick from or tested positive for COVID-19, please do not join this trip. This is a Sierra Club Backcountry outing that requires everyone to submit a Medical Form prior to the start of the hike.

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.

Chapter 4

4C. Participants



Trips need participants! A basic way to attract them is by your attractive trip advertisement: and then whatever promotion your entity does (newsletters, social media), along with partnerships and your prior happy participants. As we learned in the last section (4B), your advertisement will have clearly set forth expectations and requirements in both a short and a longer description with more details. You’ll note difficulty level in the advertisement, i.e., “easy,” “moderate,” or “strenuous.” But that’s not always enough. You’ll describe the outing in a way that allows participants to “self-select” based on their own abilities. Here’s a recap and a few hints.

- 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” for participants who haven’t walked or hiked with you before.
- Describe the route in more detail than we used to do. More detail prepares participants for what to expect, e.g., for someone who might have a fear of heights, or has balance problems, or someone recovering from a surgery.
- Better descriptions without jargon will help them see if a trip is of interest to them.

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.

Evaluating Participants

As a part of assembling an outing group, a leader may evaluate participants, with the selection process becoming more rigorous for more demanding outings. **We no longer use the word “screen” or “screening,” as the paradigm has changed. Screening suggests exclusivity, the opposite of what we are trying to achieve.**

For most “O” level hikes, especially conditioning hikes, the published description will be the only information the potential participant will have 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 and there is no way to accommodate them. A leader can suggest other outings as an alternative. A “show and go” type outing with no advance signing up can present certain leadership and group management challenges that aren’t likely to come up on outings that require advance pre-evaluation (backpacks, or I, M, E rated trips).

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

“Placeholding” should not be promised prior to publication of the trip description, and all prompt applicants should receive bona fide consideration. Note that evaluating criteria should not be relaxed for friends and family members of leaders or participants.

For trips requiring additional skill levels (backpacks or I, M, E rated outings), you’ll request a hiking / climbing resumé with background information to assess their capability for the trip. This will help you and them make wise decisions about whether they are a good fit for the trip. You may also consult with leaders who have been out on trips with the potential participant. Send out more detailed trip descriptions in a *trip letter* (see below), providing another opportunity for self-selection, and an opportunity for the leader to determine a participant’s readiness for the trip.

Although an unprepared participant may be rejected at the trailhead or in some circumstances, signed out after the trip commences (*See Safety topics in Chapter 3*), evaluating should be accomplished primarily in the reservation process if possible. *And remember, the goal is that a participant is able to self-select and recognize the trip may or may not be right for them.*

Implicit Bias

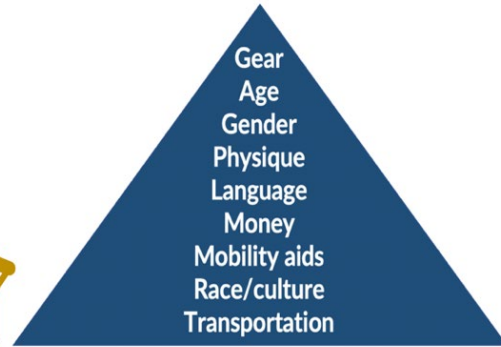
Implicit – or unconscious - bias is the process of associating stereotypes or attitudes towards categories of people without conscious awareness. Implicit bias operates outside of the person's awareness and can be in direct contradiction to a person's espoused beliefs and values. Implicit bias automatically seeps into a person's affect or behavior and is outside of the full awareness of that person.

These unconscious biases can play out in our decision-making regarding who we hire for a job or select for a promotion, which treatment options we make available to patients, who we design our outings for, and how we select participants. We know from extensive research that this kind of biased decision making plays out all the time in our schools, in hospitals, in policing, and in places of employment. The question is not *if* it is happening, but rather *when* is it happening and what can we do about it?

- Biased opinions may be held by everyone, including non-majority groups.
- They are a product of our culture.

- Bias is not a code word for racist/misogynist.
- Bias is MORE likely among those who consider themselves objective.
- Over time, bias and stereotypes become automatic associations.

How might implicit bias show up as we plan our outings?



Evaluating 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? See also Chapter 3.*

Evaluating Participants for Restricted Mountaineering Trips

Participants on mountaineering trips should be evaluated with regard to having a good fit with the trip plan and team. Leaders will communicate in their write-up the trip specifics and outline the experience and fitness needed. A participant provides their hiking/climbing/fitness resumé. Participants and leaders provide two copies of the Medical Form which can be used as part of the evaluating 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 and/or suggest that the participant consult with their physician regarding their ability to complete the trip as described.

Evaluating at the Start and During the Outing

During a Trailhead Talk / Pre-Trip Briefing, you can describe the outing again, adding weather and route conditions, and allow participants to opt out. You have the responsibility at that time to ensure that every participant has adequate personal equipment and supplies, providing another assessment of competence. *See Pre-Trip Briefing / Trailhead Talk coming up in the next section.*

Finally, even after the outing commences, you can make the very rare and uncomfortable decision to require a participant to sign out if it becomes obvious that their abilities or behavior 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 or disruptive for the planned activities; doing so can be unsafe for the individual, unwelcome for the group, and damaging to the success of the trip.



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.

The Trip Letter / Information Sheet

For a trip that requires advance signups, the leader should distribute a 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 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, include a list of participants with contact information, but under the Sierra Club insurance policy the leader must **not** arrange the carpooling for participants. The letter 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 letter 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. Some leaders send a few letters which can include some details of any conservation message, land acknowledgement and interesting historical or environmental aspects of the area.

Chapter 4

4D. Conducting the Outing



Successful outings are ones that are well-planned, starting with the leaders’ physical and mental 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. *Review the Outings Rules of Conduct in Chapter 3 of this LRB and on this page on our website: <https://www.sierraclub.org/angeles/leadership-outings/rules-conduct>.*

Getting Started

When your participants gather at the start, you and your co-leader will have several tasks: wrangling people, paperwork, and gear. This is when a good working relationship helps. Leaders know the steps and can pre-delegate where necessary. Some trips have more people, and some have more complicated details to review. A first-time leader can rehearse, consult with their evaluator or others – and they will benefit from having seen this process in action before with other leaders. Leaders learn to develop their own style, but often model on what they’ve seen. A leader can personalize things when they start interacting with participants individually and as a group.

Introductions

After all the planning and evaluating or answering questions (for a trip with advance applications), now is the time to begin the hike, walk, stroll, backpack, climb – whatever you have planned.

The Pre-Trip Briefing (also known as the Trailhead Talk)

The Pre-Trip Briefing or Trailhead Talk is an introductory or welcoming talk at the start of a hike or other outdoor activity. This is where leaders set the stage for the trip and sign people into the trip (or check them off if they pre-registered online). Above all, the leader establishes a welcoming, inclusive and safe atmosphere for the trip.



A more complete pre-trip briefing checklist is available with the [Checklists](#) section (Pre-Trip / Trailhead Talk) at the end of chapter 4. And also found on our LTC website at: <https://www.sierraclub.org/angeles/leadership-outings/trailhead-talk>

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. This waiver is also available in Campfire Events through the RSVP/Registration function. The e-waiver 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 the e-waiver is appropriate for their trip. Paper form should be available at the start for those who did not pre-register.

Leaders should mention in their write-up as well as at the trailhead that by signing in, participants are agreeing to follow the “Outings Rules of Conduct” (*In Chapter 3 and on LTC website*) and have signed the waiver. *See also about COVID protocols and medical forms.*

“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 Signing Out: The Rules.*

Start on Time!! *Stay with the plan! Starting early may provide a buffer of daylight for a long day’s outing. Remember that introductions, signing-in, and equipment checks take time.*

About Car Caravans

The leader will supply directions to a trailhead or meeting spot, but carpooling, ride sharing or anything similar is strictly a private arrangement among the participants. Participants assume the risks associated with this travel. *See Chapter 3.*

If the trip starts with a drive from a meeting spot to a trailhead, a “caravan” procedure should be used so that everyone arrives. Each car is responsible for visual contact with the car behind and If the car behind stops or is out of sight, the car in front stops. The leaders should know how many cars are in the caravan and should keep track until they are all parked.

See also Chapter 3 on Safety. Additional information on Transportation and Rideshares can be found at: <https://www.sierraclub.org/angeles/leadership-outings/ridesharing>.

Leading the Outing

Who leads? Generally, the primary leader who organized the hike is the hike leader. On a provisional, the provisional leader is expected to take the lead throughout. But on some trips, leaders may designate their sweep / co-leader or another appropriately rated leader to lead a section.

A leader who knows the route and is competent in navigation (if required) should be at the head of 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 (on non-provisional outings) so that all leaders are sensitive to the physical condition of group members is a good idea. And, delegating participants to share in watching out for each other helps in trickier terrain or weather conditions.

Key Points Along the Way

Maybe your trip plan has a lot of detail including time and place estimates. Handy when you want to know when you’ll reach that lunch spot. In Navigation, we call this a Trip Leg Table. While more part of prep for an I,M,E trip, even an O can benefit by time estimations to trail junctions.

- Junctions: The leader will stop at all trail or waterway junctions and ensure the group knows the direction to go. While waiting for the entire group to reassemble, this is not always feasible, especially on longer or large-group trips where group members may be more spread out. If you will not reassemble the group, a leader or designated person can wait for the first participant to reach the junction and pass directions from one participant to the next.
- Bathroom Breaks: When you need to take a bathroom break, Inform another group member or leave your pack in sight so that the sweep will not leave you behind.
- How many are there in your group? Count, count, count your outing participants throughout the day. The easiest way to keep track of your group is to count every time you reassemble.
- Trail/Waterway Etiquette: If you’re descending a steep trail and see hikers coming up, step off the path to let them pass. Since gaining elevation requires more energy than going down, it’s polite to give way to the person burning more calories. If the ascending hikers want to stop for a rest break, they can wave you ahead. Remember, horses always have the right of way.
- Reassemble: Depending on the environment, reassemble the group every 60-90 minutes.

Being in front doesn’t mean being oblivious to what’s going on behind you.

Setting the Pace and Breaks

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, here are a few suggestions to avoid “burnout.” 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 that 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.

Breaks and 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 bathroom 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 a steady pace, the primary reasons for periodic rests (other than equipment changes or 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 consider slowing the pace instead.

Longer rest periods are not particularly advantageous because the fall-off in concentration of waste products in the body 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. The slow breaking-in period must then be repeated. 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.

When the Plan Has to Change

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. 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. Have contingency plans ready in advance. You can use the Safety Management Plan or have this in your own notes. Examples that can affect your plan: natural phenomena (weather and wildfire); road or trail blocked; flooding. If you lead long enough, you will encounter something that can modify your trip. Be prepared. *See more later in this chapter about Hazards and Emergencies.*

Factors That Can Cause a Change of Plan

Weather is often a major factor in having to change a plan. It can also provide hazard: lightning, stream crossings, excessive heat, etc. Look at weather reports before the trip and plan ahead. Ensure your participants are prepared. Ask others who have been there recently. Sources such as avalanche centers and smoke tracking sites. Know what to do in weather emergencies. What other factors can cause a change? Not adhering to planned time allotments, condition of one or all participants, unforeseen obstacles (rockfall blocking path), tricky route-finding that results in backpedaling resulting in loss of time. And accidents. *See Risk Management and Emergencies later.*

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. During or after dinner, the leader should 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.

Group Management

“Management” implies supervision. In this context, managing a group means being a part of it, not outside, above, or apart from the participants. Being aware of the group and individual needs by personal observation from your leadership position whether in front or in back. Your co-leader will have their own leadership skills. You can sometimes rely on participants, depending on the trip and the team you build. You can adopt a buddy system or delegate participants to help keep an eye on each other in more challenging conditions or terrain.

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.

“Management by walking around” or MBWA, another acronym.

MBWA means move among your group when you can so that you know what’s going on, be able to assess moods and needs.

Keeping the Group Together

Together 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.

When in doubt, count!

Large 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 in contrast to going down. Large groups tend to spread out over the landscape especially during the last stages of trips whether hurrying down a trail or proceeding cross-country across relatively flat terrain.

Keeping the group together can become a challenge, especially as tired hikers 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. *See LRB Part Two, Chapter 6: Navigation.*

One very important aspect is being aware of the group’s physical condition. Are participants starting to lag? Do they need to eat or have a water break? Monitor these elements:

- Minor first aid issues such as blisters and sunburn
- Energy levels, 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

Staying Found

Staying Found is the key to the navigation that we teach. Even some basics will help anyone leading any type of trip. Keep track of physical landmarks. Refer to your map & route plan. Watch the time. Look behind you to see where you've come from (helpful for that return). When in doubt, stop and think. Make sure someone back home and your Outings Chair knows your plan for the trip.

See Navigation Basics in the Checklist section and even better, see LRB Part Two, Chapter 6: Navigation.

Group Morale

A positive group experience is central to a successful outing; it begins with the sense of belonging to a group. Our goal is to create an inclusive environment that is welcoming for all. Keeping the group's mood and cohesiveness up can be a challenge during a longer hike or overnight or extended backpack. Sometimes all it takes is one discouraged person to change the mood for all.

Becoming discouraged can be a personal issue where an individual is doubting their abilities or has a health crisis. Members of the group can become bored during a long stretch of the same terrain or display physical and nervous exhaustion. Sometimes, an entire group is disappointed (and perhaps disagreed) with the leader's decision to turn back, skip lunch, impose regulations, bivouac early, or leave camp before dawn. If people lose confidence in their ability to complete the trip, they as well as the group, can become defeatist or de-energized. One person doubting themselves or even doubting the leader's abilities can carry over to others in the group. It becomes a shared negative moment.

Positive Group Experience

The successful leader THINKS AHEAD and by words and actions precludes or greatly minimizes the possibility of group deterioration. Taking care to address conflicts and concerns as they happen, or soon after, rather than letting them fester, is essential to restoring harmony to the group. You may not resolve a conflict in the field, but you can calm down the situation enough to carry on and get everyone back safely. *See [Handling Conflicts and Complaints](#) in Chapter 3.*

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, refund, 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; Conflicts and Complaints and Signing Out: The Rules including signing out problem participants

Sharing Responsibilities and Delegating

A 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.



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

Review the first section in this chapter: 4A. Leadership Qualities; Roles and Styles of Leadership and remember that different situations may call for different styles in the moment.

Group Members as Effective Followers

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.

Accomplishing Goals and Meeting Needs

The outing's stated goal is defined by the trip's title and description. Participants expect that all that was described in the write-up or trip letter will be delivered. Participants should be made aware of the priorities, not just the main objective. There can be secondary goals, and even personal objectives (complete a challenging climb, view nature, learn camping or navigation skills or meet new friends).

Everyone on a trip has their own idea about what they want out of the experience and the leader can't always anticipate every single need. But you can probably count on one or several of these hierarchical needs being on their lists:

- 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 some personal rewards and growth.

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 or insight, or local history that we remember long after the outing. While most outings leaders are usually not intended to be instructors, leaders 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, or geology or indigenous people's culture) 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 groups, sections and committees actively promote teaching. The Wilderness Travel Course is a teaching entity; although their summer backpacking trips are not typically 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. Experience can mean making the same mistakes over and over, until sufficiently stressful circumstances finally reveal the deficiency.

The End of the Trip

The trip is not over until all members are accounted for. At the end of the outing, you'll 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. *Chapter 3 has more information on forms, signing in and out, and incidents.*

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. You may even meet someone new who shows leadership potential, and you can steer them to an LTP seminar. 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.

4E. Risk Management and Emergencies



Group Management can be a breezy walk in the park for many of the trips we lead. But even a simple shoreline stroll involves some risk that a leader may have to deal with. Having thought some of this through ahead of time will help so that in the fog of the moment, there is a plan and one that has been shared with the other leader and with the Outings Chair back home. This section covers risk management, hazards, and emergencies during the outing as opposed to policy. *See Chapter 3 for safety and policies.*

This section reviews emergencies and hazards leaders may encounter on different types of trips, along with emergency responses. *See Chapter 5: First Aid* for more details about injuries and illnesses. Leaders must be constantly alert to potential hazards during the outing. Steep banks, loose rocks, stream crossings, poison oak, and icy patches are some. 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.

Risk Management

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

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 junction of environmental hazards (weather, terrain, rockfall, or equipment faults) and human factors (gaps or weaknesses in planning, skill, leadership, communication, or physical condition). An effective leader finds the best balance through their self-knowledge, training, modeling other leaders, thoughtful experience, and ethical decision-making. All these point to a basic strategy: be aware of environmental hazards and anticipate their impacts to avoid or minimize consequences.

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. The best tactic is an essential part of group management: advising the party (at the start or during a stop) of 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.

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, as 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, Lost Persons and more.

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 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 for how to reunite.

If the leader is not present or is injured, the group may be momentarily paralyzed. The co-leader leader must immediately take over. If neither is present, it is imperative that an acting leader be selected. Someone may volunteer to assume the role of leader, or verbalize the need for a single leader, and perhaps nominate someone, or simply assume the role and take action.

In an emergency the leader does not have 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 be a messenger and 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. *An emergency is reported as an incident; when in doubt, fill it out. See Chapter 5 for First Aid considerations. See LRB Part Two, Chapter 6: Navigation for route-finding.*

Accidents and Emergencies

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

- Limit the emergency
- Render first aid as necessary

- Get outside help if one cannot handle the situation properly
- Complete the recovery.
- Report the incident according to Incident Reporting Policies. *See Chapter 3 and LTC website.*

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

MANAGING HAZARDS

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 rockslide 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.

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

With the ongoing drought and rising temperatures, wildfires are happening more frequently and with more dangerous and unpredictable behaviors especially in forests infested by the bark beetle. Brush and forest fires whether prescribed or natural 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. If you know a fire is near a region in which you planned to go, monitor the conditions via Inciweb or Calfire or other fire and smoke monitoring sites.

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 cleverer 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. Bushwhacking 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 often right beside the trail. Check warnings about “Poodle Dog bush” - *Eriodictyon parryi* and other noxious plants in places you plan to go.

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. The National Park Service advises that if a mountain lion acts aggressively toward you, stand tall and raise your arms, open your jacket, and speak firmly in a loud voice. Without crouching or turning away, you may throw objects in its direction. (*Taking selfies with it is not advised.*)

A Safety State of Mind

In order to “explore, enjoy, and protect,” we lead groups 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.

The 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 on 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—overestimating 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.

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
- Staying firmly attached to the ice axe
- 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.

Emergencies

Your Safety Management Plan is your friend. Especially in an actual emergency. Emergencies take on

different looks: injury or illness of one person or several; an environmental hazard that stops the group; an psychological or emotional situation that compounds a natural event. See chapter 5 for First Aid considerations: not a first aid manual, but lots of information and arguments for good training especially for longer or more ambitious outings.

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 for a day hike can use these skills in local mountains and deserts. See [Chapter 5: First Aid Considerations](#).

Evacuation

Can the leaders and group handle the situation without outside help? Is evacuation the best solution? An evacuation is necessary whenever a person's condition requires that they end the outing before the scheduled time. An evacuation can be simple such as a person walking out on their own or with minimal assistance; or complex if a person requires transportation. The person's condition and the conditions at the site should guide the leader in selecting an appropriate evacuation strategy.

Having a group carry their own member is usually more strenuous than first considered and includes additional risks to the outing members.

Requesting additional transportation support generally involves a local search and rescue team and either a litter carry-out or a helicopter. If the leader sends for help, the messengers should have adequate information about the incident, name of injured party, location, status; they do not need to carry any forms; they could take a photograph of a form with them, but since they need to get moving, there is no need to waste time doing that. 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. Care and safety of the non-injured group members must remain a priority, despite the urgency assigned to the injured person.

Reminder: "In the event of an extremely serious injury or fatality, the national Sierra Club office must be informed immediately after appropriate first aid and coordination with 911, local sheriff, or proper responder. The toll-free emergency number for such reports is 1-888-OUTINGS (1-888-688-4647) (International-303-281-9914)."

Personal Locator Beacons

A Personal Locator Beacon (PLB), such as SPOT and Garmin 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

Even if the leader does everything right, some member of the group may become separated from the group - misplaced. See also Chapter 3: Safety, section on Lost Persons.

Form a Plan.

If the leader(s) have 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, remember that many barriers block sound travel in mountainous terrain. Good judgment will clear up most of these situations.

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, and 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** is the obvious rule to follow.*

Checklists: Emergencies, Planning, and Briefing

Here are several useful checklists and guides. Emergency Response; Basic Trip Planning Checklist; Navigation Basics Guide; and a Pre-Trip Briefing/Tailhead Talk Guide.

EMERGENCY RESPONSE CHECK LIST

This is a general checklist. See also Chapter 5 First Aid Considerations:

Responding to Wilderness Accidents and Illness.

Scene Management:

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

Patient Care/First Aid: (Stay within your level of training! (And See Chapter 5)

- Get consent to help the patient. (unconscious = consent).
- Use protective barriers (gloves, breathing device).
- 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?*
- Do a secondary survey and record patient information. Review individual's medical form, if applicable. See Chapter 5 for the ***Emergency Response – Patient Report (ERPR) Form User's Guide.***

- Stabilize patient and scene before sending for help.

Develop an Evacuation Plan

- Review your Safety Management Plan. The Emergency-Patient Report Form also 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 depending on overall group size.
- Team should have necessary gear and food to be self-sufficient.
- Team may 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.

Report this emergency to Sierra Club as soon as possible and file an Incident Report. The toll-free emergency number for such reports is 1-888-OUTINGS (1-888-688-4647) (International-303-281-9914).

See LRB Chapter 3 for more.

A BASIC TRIP PLANNING CHECKLIST

A short day-hike will differ from a longer one; front country will differ from backcountry; multi-day from a single day. Terrain, experience, time of year, weather – all will have an impact on your plans. Remember: *Who. What. Where. Why.* Have your trip advertisement handy. *For a more advanced trip at I level or above, these same items apply, plus gear and more.*

- ☐ Who is going with you? Co-leader? Who are the participants? Skills? Families? Any minors?
- ☐ Partners? Experts? any teachers, guides or special skills instructors involved?
- ☐ Land agency / landowner / park restrictions? Group size? Boundaries?
- ☐ Permits?
- ☐ Why are you doing the trip? What is the purpose, objective, theme?
- ☐ Is your trip front or back country? *See Chapter 3, Safety Management Plans and LTC website.*
- ☐ Time of day; time of year. Enough daylight?
- ☐ Directions to a meeting point or the start or trailhead.
- ☐ Trailhead parking and bathroom facilities.

- ☐ Route Plan, Trip Leg Table, a way to know the “legs” or sections of the route, e.g., trail junctions, turnouts, overlooks, etc.
- ☐ Spots for personal breaks, 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 – See “Naismith Rule” below. Don’t rely on other people’s descriptions - some are notoriously understated.
- ☐ A solid plan also has a Plan B in mind. For any trip, you’ll want to have researched 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? history of the place you are hiking into? is it a place that indigenous peoples occupied and held sacred?
- ☐ Got forms? Sign In Sheet / Waiver(s) / Medical Forms / Emergency-Patient Forms (for emergencies).
 - ✓ *Trip Plan and Safety Management Plan (SMP). This form is for any level of trip.*
- ☐ Backpacking? Need to do a Trip Letter? This is what you’ll share with your participants who have signed up or are considering signing up, depending on the trip.
- ☐ Doing an I-level trip with cross-country? You’ll want to have topo maps, apps, navigation tools and possibly have special gear, footwear or clothing requirements.
- ☐ Backpack? Have a gear list handy and include extra items in your car for those who may have forgotten something. An extra bear canister, fuel.

Navigation Basics For an O Level Trip

The basic navigation skills needed for an “O” level trip are not as advanced as those needed for a trip that leaves the trail. Use some simple 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. Here are the basic planning factors: Time, Distance, Group Size, Route and more.



How long will your trip take?

- **Naismith Rule** = Naismith’s Rule for day hikes on trail: Time equals one third distance plus one half height, assume hiking at 3 miles per hour, plus 30 minutes for every 1,000 feet gain.
- **Backpacker’s Rule** for travel on trail: Time equals one half distance plus height, assume hiking 2 miles per hour plus one hour for every 1,000 feet gain.

See Chapter 1’s Navigation pointers and see LRB Part Two, Chapter 6 to learn more about navigation.

NAVIGATION BASICS

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 Home page: <https://www.sierraclub.org/angeles/leadership-outings>

The PRE- TRIP BRIEFING aka 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, safety management plan, patent response, medical forms, and minor forms if applicable.

Welcome and Introductions

- Gather the group together and introduce the trip, yourself/other leaders
- Set a warm, welcoming, and inclusive tone by acknowledging everyone. You can use the Safe Space Agreement and paraphrase in a way that is comfortable for you.
- Ask participants to introduce themselves.

Roles and Expectations

- Explain the leader's role and responsibility to the group.
- Set or reaffirm the leader's expectations for the outing: where, what, when
- Ask participants for their expectations and concerns

Complete Paperwork and Sign Waivers (can be done before the talk)

- 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.
- Review medical forms, if applicable.
- Make sure that you have medical authorization forms for all unaccompanied minors

Introduce the Conservation Message and Relevant Topics

- Introduce any issue you plan to discuss, materials you may hand out, etc.
- Environment and history of the area you are traveling in
- Land acknowledgement if appropriate.

Route Plan and Trail Conduct

- Describe the day's route and travel plan including turnaround time, breaks and lunch.
- Explain "leader and sweep" and set rules for group travel, staying between the trip leaders.
- Explain Leave No Trace highlights that apply to your outing.

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.

First Aid

- Each participant should have some first aid supplies as part of their 10 Essentials.
- For trips with no medical forms: Ask if anyone has medical issues (allergies, respiratory, cardiac) that you should know about; if so, to let you or the co-leader leader know in private. Likewise, ask if anyone is a medical professional.
- Remind participants about foot and blister care – treat hot spots immediately
- **COVID-19:** You will have advised participants that if they have symptoms, not to attend. *There is more to explore on this subject on the LTC website and your Outings Chair can point you to the most current information.*

Equipment and Food

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

Are you ready to go?

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

Ending the outing: Reminders

- Double check the sign-in sheet or trip roster to ensure all participants are accounted for.
- Invite non-members to join the Club
- 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.

THE 10 ESSENTIALS AND GEAR & 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.



Onward to Chapter 5: First Aid Considerations



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 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 Angeles Chapter 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 (WFA) course as well as adult CPR, as noted in chapter 1. We strongly urge O candidates or leaders who plan to lead backpacks or other trips more than an hour distant from emergency medical services to study wilderness first aid. A WFA (16-hour or above) may become a requirement for group trips into certain National Parks.

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 after having taken the 24-hour the first time. See LTC website.

The first aid certification of a current leader is valid until the expiration date shown on the certificate or three years, whichever is earlier. Current leaders with any rating may recertify by taking any first aid course listed at <https://www.sierraclub.org/angeles/leadership-outings/first-aid> or approved by the LTC First Aid Chair Steve Schuster (steve.n.wfac2@gmail.com). If the previous first aid course taken by the leader had classroom hours, then the renewal course (first renewal only) may be purely on-line. Current leaders planning Restricted outings are subject to the constraints listed above.

Some groups, sections and committees place additional requirements on their leaders, e.g., Wilderness Travel Course (WTC) Group Leaders. Medical professionals with good first aid skills are welcome to contact Steve to discuss the possibility of abbreviated requirements.

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 that is on the provider card (e.g., Red Cross, American Heart, etc.). Leaders should share a photocopy of the card that shows the date.
- Refreshing standard first aid: leaders may do an online course only every other time they are renewing the certification. (During COVID, we accept two back-to-back online recertification.
- 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 First Aid (FA) and CPR to include in your requirements to be an Angeles Chapter 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.

- **O 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
<https://www.sierraclub.org/angeles/leadership-outings/first-aid>

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 requirement.
- 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. If an I/M/E candidate wishes to extend their first aid currency, a 16-hour WFA course is sufficient as a refresher. And O-level candidates will benefit as well.

- 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 (24 hour initial/16-hour refresher minimum); the other current in (at least) Standard FA.
- I or M leader wishing to advance their rating, 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 (Check our list for exceptions during COVID.)
- 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 Garmin inReach or 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. Times in our local mountains will usually be much less. 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 them.

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.

First Aid: Legal Considerations

Obligation To Render Aid

No state in the United States has laws that require you to provide first aid assistance to a stranger in distress. Some states do have laws that require you to promptly report such a situation to the authorities. Any obligation to render first aid that does exist in such circumstances is ethical, not legal.

A legal obligation to render first aid and assistance (“duty to the patient”) exists for leaders of organized outings. It also exists when you have caused injury to another, for example, knocked loose a rock that struck someone else.

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 condition has been stabilized or the patient’s care is transferred to another qualified person. Failure to do this 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 that 1) this step is in the patient’s best interest; 2) 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, 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 him/herself 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.

Hypothermia and Heat Problems

The chart below describes how to recognize hypothermia (cold) and heat problems from mild to severe. Cold problems range from mild to profound (moderate-severe). Heat problems range from heat cramps to exhaustion to stroke (extremely severe). Note that a person can experience hypothermia even in mild weather especially if they are wearing clothing that hold onto moisture and a cooling wind comes up. People can react differently to temperatures. In the southwest, heat problems (hyperthermia, or overheating) are the most obvious and occur in local mountains and deserts. Included below the chart are treatments from Steve Schuster, First Aid Chair.

RECOGNIZING HYPOTHERMIA AND HEAT PROBLEMS

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

Hypothermia and Heat Treatments

Mild Hypothermia Treatment

- Stop travelling.
- Replace wet clothing with dry or wrap patient in a groundsheet.
- If patient is fully oriented, give them warm or hot fluids.
- Give patient something with carbohydrates and sugar to eat.
- Encourage patient to shiver.
- If available, put patient in sleeping bag on foam pad.
- No exercise for 30 minutes; after that, begin gradually.

Moderate-to-Severe (“Profound”) Hypothermia Treatment

- This is a medical emergency – notify SAR and request evacuation of patient.
- Get patient out of the weather and wind if possible.

- Minimize patient movement and do not rub the limbs.
- Remove wet clothing without moving the limbs – cut it if needed.
- Give no food – warm liquid is OK if patient is fully oriented.
- Put patient in a sleeping bag on a foam pad.
- Add Nalgene bottles full of boiled water – make sure they do not touch the patient's skin.
- If heated water is unavailable, put another warm body in the sleeping bag with the patient.

Heat Cramps Treatment

- Stop the hike and have the patient sit down.
- Have the patient drink a sports drink or drink water and eat salty foods.
- Encourage the patient to stretch the affected muscle.
- Massage the affected muscle if the patient allows it.

Heat Exhaustion Treatment

- Stop the hike and have the patient rest in a cool(er) spot.
- Have the patient drink a sports drink / replace electrolytes.
- Monitor the patient – if they improve in 30 minutes, then resume the hike.
- If the patient does not improve in 30 minutes, then they must be escorted back to the trailhead and must seek medical treatment.

Heat Stroke Treatment

- Shade the patient and insulate from ground.
- Lay patient flat and remove clothing.
- Spray the patient with water and fan them.
- Apply cool cloths to the patient's trunk.
- Monitor patient temperature if possible.
- Request evacuation by SAR.

Wilderness Accidents and Illness Checklist

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. The Emergency Response–Patient Form is a useful tool for documenting information pertinent to wilderness incidents. Thanks to Steve Schuster and his Wilderness First Aid Course (WFAC).

Responding to Wilderness Accidents and Illness

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; 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 they are? (e.g., their name)
- Place—where they are? (in a park? name of the park or forest?)
- 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

- The Medical Form, which is required to be completed by participants in advance for certain trips, should be reviewed for relevant information, particularly if the patient is unable to respond to inquiries. *See Chapter 3 for further information on the requirement for an individual medical form.*
- Ask the patient about the following aspects of their medical history. If this is a trip that required a medical form, you would have some advance familiarity with some of this.
- 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. You can refer to their medical form if applicable.
- Previous Medical or Surgical History—ask the patient whether they have had illnesses, operations, or chronic conditions that might be relevant to the current situation. You can refer to their medical form if applicable.
- 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 him or her to resist. Then pull down (away from the patient’s head) on his or her feet and ask him or her to resist. Can the patient exert a normal amount of force with his or her feet, and is the force roughly equal on both feet?

Put the patient’s socks and shoes back on and move up to their 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? 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 their 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 them 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
- When in doubt – position of comfort (per patient) or lying flat.

COVID-19 and Contagious Illnesses

If a participant begins showing COVID-19 symptoms: Current protocols include: Provide on-trip management of any participant who develops symptoms during the trip. Including: isolate and require a mask, assist walking evacuation, if possible. Assist the person in finding transportation home or isolating in a separate room/tent. And report as an Incident. *See Chapter 3 and LTC Incident Reporting page.*

Emergency Response - Patient Report Form

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 waivers, the safety management plan and individual medical forms if applicable, a copy of an Incident Report form, 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 five 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 his using appropriate strength? Can patient push up/down/in/out against your hands using his 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 their 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 his/her gear will be taken care of if he/she is to 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 accident 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 after the accident.
- Send someone out with the injured person. Unless the victim is evacuated by professionals, be sure he or she 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 his or her fault. Don't make any deprecating remarks or imply that he/she was clumsy or otherwise inadequate. Do sympathize with his/her 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. 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
Totals		230	102	332

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; quantities may be a matter of preference but consider that at any given time you may have more than one person requiring your care.

See LTC’s [First Aid Page](#) to view and download the chart on the next page.

<https://www.sierraclub.org/angeles/leadership-outings/first-aid>

A FIRST AID KIT: <i>One of Your 10 Essentials</i>	Day Hiking / Backpacking	Optional but Useful
WOUND MANAGEMENT		
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)		+
MEDICATIONS		
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		+
MISCELLANEOUS		
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

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.

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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End of LRB2022 Part One, Chapters 1-5

(Separate) Part Two: Chapters 6,7,8

Navigation

Rock

Snow

Special thanks to Laura Rainey who helped us prepare this version and is helping with our LTC website. We welcome volunteers for helping with our seminars as well as graphics and writing tasks.

Jane Simpson,, LTC co-Chair and webmaster

Adrienne Benedict, LTC co-Chair and Administrative Chair