

**ACTIVITIES SAFETY AND TRAINING POLICY**

**Range of Light Group**

**Toiyabe Chapter -- Sierra Club**

**March 1993**



Approved

By majority vote of the Group Executive Committee

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Attachments:

Sign-In Sheet

Emergency Report

Accident Report

## Activities Safety and Training Policy -- Range of Light Group

- 1.0 **Background and Scope** - The Range of Light Group, Toiyabe Chapter, Sierra Club, conducts outings and other activities for the benefit of Sierra Club members and the general public. This policy establishes the requirements for the management and safe conduct of such activities.
- 2.0 **Approval** - This policy shall become effective when approved by a majority of the elected Executive Committees of the Range of Light Group and the Toiyabe Chapter.
- 2.1 **Resolution of Conflicts** - In the event of a conflict between this policy and other Sierra Club policies, this policy shall govern by virtue of its approval by the Chapter Executive Committee. If a change in this policy is required by the Club or Chapter to reflect new requirements, the change shall become effective when announced to the group's leaders. A formal amendment shall be adopted by the Group Executive Committee, approved by the Chapter Executive Committee, and announced to the leaders.
- 2.2 **Legal Requirements** - In the event of conflict between this policy and legal certification requirements (for boating, for example), the legal requirements shall take precedence or shall be considered additional requirements of this policy. If one part of this policy conflicts with legal requirements, the remainder which does not shall still be valid.
- 3.0 **Activities Safety and Training Policy** - The purpose of this policy is to assure that group activities are conducted in a safe and orderly manner, and that all events are properly covered by Sierra Club liability insurance. Only activities conducted in the name of the Group under the authority of the Executive Committee are Sierra Club activities.
- 3.1 **Conduct of Activities** - It shall be the policy of the group that activities are conducted by members for other members, and not by the officers except for regular meetings and official functions. Additional requirements apply to outings.
- 3.1.1 **Scheduling Activities** - Notices of outings and other activities proposed by current or prospective leaders shall be published in the group or chapter newsletter, another Sierra Club newsletter, any other official Sierra Club publication such as the Chapter newspaper, local journals of public record, or documented in the minutes of the Executive Committee. When the need for immediate action does not allow time for such publication (for example, in the case of an organized response to an environmental or political alert), the elected or appointed officers of the group may act in their official capacities to call meetings or organize such actions in keeping with the bylaws and previously-approved and documented group policy. In all such cases where there is no prior public record, the officer responsible shall submit a report to the Executive Committee, which shall be attached to the minutes.
- 3.1.2 **Leading of Activities** - The leaders of all activities shall be Sierra Club members in good standing. Except for outings requiring qualified leaders, any Sierra Club member may propose an activity. Prior planning by the group's officers shall not be required.
- 3.1.3 **Approval of Activities** - All activities proposed by members and not regularly conducted by the Executive Committee shall be approved for publication by the appropriate officer, such as the outings, social, or conservation chair.
- 3.1.3.1 **Submission of Notices** - Members who wish to conduct such activities shall send the notice to be published to the appropriate officer for approval before the publication deadline.

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- 3.1.3.2 **Format of Notices** - Notices shall be typed in the format required by the publication, with one copy for the group and one for each publication in which the notice is to appear. This format can be determined by examining current issues of the publication.
- 3.1.4 **Finances** - Leaders of activities involving money shall follow group financial policies in handling funds. Pricing shall include allowances for contingencies and group indirect expenses. Leaders shall keep activities funds separate from their personal funds. Participants shall be instructed to make checks payable to group, and all funds received shall be deposited in the group bank account. Advances shall be made with group funds, and payments shall be made only upon receipt of a written invoice by the group treasurer. Leaders shall make financial reports in the form prescribed by the Executive Committee.
- 3.1.5 **Insurance Requirements** - This policy does not specify insurance requirements, which are defined by national Sierra Club policies that change from time to time. Meeting the requirements of this safety policy does not necessarily assure that a given outing or activity is adequately covered by Sierra Club insurance. Leaders, officers, and Executive Committee shall be responsible for determining in advance whether a proposed activity is covered by current insurance policies, and whether concessions or transportation companies carry insurance which is adequate to protect the club under current club policy. For a given activity, additional insurance may be obtained if the coverage is approved by the club's national office. The costs of such additional insurance shall be included in fees paid by participants.
- 3.2 **Outings** - This section establishes the policies for the management of outings.
- 3.2.1 **Definition of an Outing** - An outing is a Sierra Club activity whose success and safety is dependent upon the leadership ability and emergency performance of qualified Sierra Club leaders directly responsible for the group. Outings involve leading participants to destinations in groups, especially to places where professional emergency assistance cannot be promptly obtained. An activity without any of these elements of group control, remoteness, and responsibility for safety shall not be considered an outing, but a conducted, social, conservation or public affairs activity. Examples:
- A casual walk incidental to a picnic in a public picnic ground is a social event, but a walk in a remote area is an outing.
  - A volleyball game in a city park is not an outing but a social event.
  - A lawn party or picnic to raise funds for conservation is not an outing, but a trip to a remote area with hiking to points of conservation interest is.
  - A ski trip at an area patrolled by a ski patrol is a conducted activity (see below for definition).
  - Because of the need for group control, a bus or plane trip shall be considered an outing and shall be led by qualified leaders, even though the activity at the destination does not involve an outing.
- 3.2.2 **Outings Committee** - The outings program shall be managed by the group Executive Committee with the advice of the Outings Committee, which shall consist of all qualified Sierra Club outings leaders who are voting members of the group. The Outings Chair shall be appointed by the group Executive Committee. The Outings Committee

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may meet from time to time to make recommendations for the scheduling, financing, and conduct of outings.

- 3.2.3 **Conservation and Public Affairs** - Outings connected with the conservation and public affairs activities of the group shall be planned and conducted by the appropriate committees, but all safety provisions of this policy shall apply.
- 3.2.4 **Joint Sponsorship** - If an outing is sponsored by another Sierra Club organization in cooperation with the group, the outings and safety policy of the organization listed first in the published notice shall govern. If the notice is listed in the newsletters of both organizations, the announcement should make clear which organization is the primary sponsor, and which leader is the principal leader.
- 3.2.5 **Events Sponsored by Others** - When an outing or other event sponsored by another Sierra Club organization is published in the group newsletter as a courtesy, the name of the sponsoring organization shall be indicated in the published notice. The provisions of this policy do not apply to such events.
- 3.2.6 **Out-of-Area Outings** - Notice of outings conducted outside California shall be given to each Chapter of the Sierra Club in whose territory the outing will be conducted.
- 3.2.7 **Extended or Foreign Outings** - Foreign outings or outings whose duration is ten days or more may be scheduled only upon approval of the Sierra Club's national office. Special insurance coverage at extra cost may be required for foreign outings. All such costs shall be borne by the participants with appropriate surcharges for indirect cost.
- 3.2.8 **Conducted Outings** - Qualified outings leaders shall not be required if an outing is conducted by leaders of another agency, such as a professional guide service, Forest or Park Service Rangers, or others. Participants shall be informed that the primary responsibility for safety rests with the conducting agency. Leaders shall verify that the conducting agency actually does accept this responsibility and has appropriate insurance; in doubtful cases, the outing shall be treated as if sponsored by the Sierra Club.
- 3.2.9 **Specialized Outings** - The management of specialized or technical outings (such as backcountry skiing, river touring, sailing) shall be charged to subcommittees consisting of the leaders qualified to lead such outings. The chairpersons of all such subcommittees shall be appointed by the Executive Committee, considering the recommendations of the leaders. Recommendations of such subcommittees shall be confirmed by majority vote of the Executive Committee before going into effect.
- 3.3 **Safety** - This section establishes the policy for assuring the safe conduct of outings and other activities.
- Note** - Samples of sign-in and other forms referred to below are attached. It is recommended that leaders make their own photocopies using these samples as originals.
- 3.3.1 **Safety Committee** - The safety policy shall be administered by the Executive Committee with the advice of the Safety Committee, chaired by the Safety Chair, who should preferably be the most experienced and highly-qualified leader willing to serve. The same person may serve as Outings and Safety Chair. Other committee members may be appointed by the Executive Committee. All members of the Safety Committee shall be qualified leaders.

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- 3.3.2 **Policy Notice** - A brief summary of this safety policy shall be published in each issue of the group newsletter.
- 3.3.3 **Publication Requirements** - The publication of the notice of an outing or any other activity creates a presumption that the Sierra Club is the sponsor of the activity and has an obligation to conduct the event in a prudent manner. Publication also binds the Club's insurers. Requirements for publication shall be as follows.
- 3.3.3.1 **Contents of Outings Notices** - All notices shall indicate the location, goals, duration and expected difficulty of the outing, and the names of the leaders and reservationist. All such persons shall be Sierra Club members. The notice shall contain the other detailed information indicated in the section on the conduct of outings below.
- 3.3.3.2 **Approval of Outings Notices** - Announcements shall be approved by the group Safety Chair or another designated member of the Safety Committee, normally a qualified leader who is member of the newsletter editorial staff. A copy of the group newsletter shall be sent to the Toiyabe Chapter Executive Committee.
- 3.3.3.3 **Conversion of Sponsorship Prohibited** - Once an outing or other activity has been announced in a Sierra Club or other publication, the activity must be conducted as a Sierra Club activity, or canceled. Conversion to private or other sponsorship may invalidate insurance coverage, but does not shield the Sierra Club from liability, and is therefore prohibited.
- 3.3.4 **Classification of Outings** - The Toiyabe Chapter has established difficulty classifications for hiking and other activities, described from time to time in *Toiyabe Trails*, which may be used to classify group outings.
- 3.3.5 **Specialized Outings** - The Executive Committee may require that there be separate safety policies for specialized or technical outings, covering the skills required of leaders and participants. Each such separate policy shall be an appendix to this policy and shall be administered by a subcommittee of leaders qualified to lead such outings. The Safety Chair shall be an ex-officio member of each such subcommittee, but shall not have the right to vote unless he or she is a qualified leader for that activity as provided in the subcommittee's rules.
- 3.3.6 **Leadership Requirements** - Each outing shall be conducted by one and only one principal leader, who shall be assisted by at least one assistant leader (or by qualified substitutes, if necessary). The name of the principal leader and whenever possible the assistant(s) shall be listed in the published notice. The principal leader and assistant shall both be qualified to conduct the outing. The principal leader may appoint assistants in the field from the Sierra Club members present. Leaders shall be capable of conducting the outing, controlling the group, and shall be capable of handling emergencies using appropriate Sierra Club procedures. Leaders shall know the areas to be entered and the conditions to be encountered.
- 3.3.7 **Qualification of Leaders** - The qualifications of all group leaders shall be approved by the Executive Committee upon nomination by the Safety Chair. Leaders shall be qualified according to the level of skill and experience required. Except as provided below, no leader may lead an outing requiring skills in excess of the leader's qualification.
- a. There shall be no requirement that the leaders of a proposed outing be qualified in

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order to propose, schedule or publish a proposed outing, but if the leaders are not qualified at the time of the outing, qualified leaders shall be substituted or the outing shall be canceled.

- b. Leaders must be Sierra Club members at the time of the outing, but need not be members of the chapter or group.
- c. All leaders shall have undergone basic first aid and safety training, or have equivalent experience. Leaders of more specialized outings (backpacks, desert climbs, ski tours) shall be familiar with the guidelines in the Sierra Club Outings Leader Handbook, and shall have proven their ability to apply them in the field. The qualifications of leaders for these more specialized outings shall be considered as additions to the basic requirement rather than ranks or levels. To qualify, inexperienced leaders shall obtain basic first aid and safety training, shall have participated in at least five chapter or group outings, assisted on at least two outings, and led at least two outings with a fully-qualified assistant. Such outings shall be of the types proposed to be led.
- d. In special circumstances a leader lacking the required qualifications may lead or assist on an outing with the prior approval of the group Executive Committee or its authorized representative, usually the Safety Chair.

3.3.8 **Qualification of Participants** - The leader of each outing shall be responsible for qualifying participants.

- a. The leader may screen prospective participants to assure that they have the skills, conditioning, and equipment required for safety, and shall have the authority to reject unqualified participants. Such screening shall be performed by the leader or a qualified assistant, and not by a reservationist or other person unqualified to lead the outing.
- b. Persons under 18 shall be accompanied by a parent or guardian or have written permission giving an emergency phone number and authorization for medical treatment in case of necessity.
- c. Because of requirements for limited group size in some circumstances, or for participant screening, the leader may require that participants reserve a place on the trip.

3.3.9 **Conduct of Outings** - Leaders shall conduct outings in such a manner as to enhance safety. Participants are expected to cooperate in this effort. The leader shall have the authority to modify or terminate an outing if necessary for reasons of safety. The following steps shall be followed in the conduct of outings:

1. **Outings Proposal** - Leaders shall propose an outing by providing an appropriate notice for publication to the group Outings Chair as provided above. The following information shall be included in each notice:

- a. Date(s) of outing (inclusive), including days of week.
- b. Name of sponsoring organizations, normally Range Of Light Group (omitted in the group newsletter unless the sponsoring organization is not the group).
- c. Outing destination or location.



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- d. Description of outing, including all restrictions or constraints.
  - e. A quantitative indication of trip difficulty or strenuousness (exposure, miles covered, elevation gain).
  - f. Special participant requirements, if any.
  - g. Meeting place or reservation procedure.
  - h. Names of leader and assistant leader(s), and reservationist, if any.
  - i. Outing difficulty classification (optional).
2. **Outing Approval** - The outings notice shall be published after certification by the group Safety Committee or its authorized representative (usually the Safety Chair or an authorized member of the newsletter staff) that:
- a. The leaders are qualified to lead the outing, or may be expected to be qualified by the time of the outing.
  - b. Difficulty and participant qualifications are adequately addressed, and
  - c. Insurance and jurisdictional problems have been resolved.
3. **Participant Reservation and Screening** - Because of requirements for limited group size or for participant screening, the leader may require that participants reserve a place on the trip. When appropriate, the leader shall investigate the qualifications of participants, and may refuse to accept participants with inadequate conditioning, skills, experience, or equipment.
4. **Group Size and Camping Restrictions** - Groups under control of two leaders shall be limited in size as required by wilderness or other restrictions. All camping restrictions shall be observed, including respect for private property.
5. **Instructions to Participants** - The leader shall see that all participants receive adequate instructions. Instructions shall include as applicable:
- a. Detailed physical condition, skill and equipment requirements.
  - b. Meeting place and time; directions to meeting place.
  - c. List of other participants (for car and equipment pooling).
  - d. Sign-in/Sign-out requirements.
  - e. Basic outing safety and conduct requirements.
  - f. Liability exclusions (club not responsible for travel by private car, public conveyance, or losses of any kind including theft, medical expense, or search and rescue expenses).
6. **Permits** - Prior to the outing, the leader shall obtain all required permits, releases for use of private property, medical releases for minor participants, and shall in general

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see that any similar arrangements are made.

7. **First Aid Kits** - The leaders shall make certain that a suitable First Aid kit is carried on each outing. The recommended contents of such a kit are listed in Table 1.
8. **Missing Leaders** - If the principal leader does not show up, the assistant leader may act as the principal leader, and may appoint other assistants from among the participants, providing an appropriately-qualified leader is available. If neither leader shows up, and at least two participants are appropriately qualified Sierra Club leaders familiar with the outings plan (having, for example, been there before), these participants may reorganize the trip under their leadership, modifying the objectives if necessary for safety. One and only one person shall always be designated as the principal leader to make final decisions. If qualified Sierra Club leaders are not present, the trip shall be unconditionally canceled.
9. **Sign-In** - All participants shall sign in at the meeting place, giving the name and phone number of a person to contact in an emergency. Completed sign-in sheets shall be returned to the group Outings Chair and kept on file for at least three years. Use of the standard group sign-in form is recommended but not required.
10. **Equipment Check** - Leaders shall encourage participants to perform a complete equipment check before leaving the roadhead. Participants should be encouraged to share redundant equipment (stoves, tents, first-aid kits, etc.).
11. **Group Control** - The leaders shall keep the group together whenever possible, and keep aware of the location and condition of all participants. One leader shall keep control of the front of the group, and another shall bring up the rear. Participants shall cooperate with the leaders and recognize their authority. The leaders shall modify the outing plan as necessary to avoid exceeding the capability of the group, and shall abort the outing objective if circumstances prevent its completion in safety. Especially in difficult terrain, bad weather, or conditions of poor visibility, it is essential that participants stay within sight of each other. Anyone losing contact with the group shall go to the point where other participants were last seen, and wait until contact is reestablished. A person who is actually lost (not knowing how to proceed) should stay where he or she is.
12. **Appointment of Field Assistants** - A leader may appoint any Sierra Club member as a field assistant on an outing. If questions of safety are involved, the member appointed should be the most qualified person present.
13. **Splitting the Group** - Leaders shall avoid splitting the group whenever possible. When such splitting is necessary, the leader shall appoint a separate leader and assistant for each group, who shall be Sierra Club members. The participants shall be told which leader will make decisions in an emergency.
14. **Leaving the Group** - Participants who leave the group to pursue private objectives shall sign out with a note indicating their destination. The leaders should discourage inexperienced participants from leaving the group if there is any doubt about their ability to carry out their objectives.
15. **Car or Truck Caravans** - Drivers in a car or truck caravan in remote areas shall slow down or stop as needed to keep the following vehicle in sight.
16. **Leaving Base Camp and Roadhead** - On overnight outings, base camp is not to be

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abandoned until all participants are accounted for, and on all outings, no one is to leave the roadhead until all participants are accounted for, and all motor vehicles are started.

17. **Personal Conduct** - Personal conduct of all participants shall be in accordance with the Sierra Club Rules Of Conduct.

3.3.10 **Accidents, Injuries, and Emergencies** - Leaders shall be prepared to deal with injuries, illness or other emergencies, recognizing emergencies early and responding completely. Other specific requirements shall be as follows:

- a. In cases of an accident or sudden illness, at least one person shall stay with the injured or ill while others contact the leader.
- b. All participants are expected to cooperate fully with the leader, and to remain with the group in spite of previous personal commitments, unless otherwise directed by the leader.
- c. The group shall first draw upon its own resources in the resolution of the crisis. Should the situation be beyond the capabilities of the group, then the use of professional assistance is warranted. In the event of an emergency requiring search or rescue, leaders shall contact the National Park Ranger or the County Sheriff, and the Sierra Madre Search and Rescue Team.
- d. Messengers sent for assistance shall wherever possible be given complete written instructions, using an Emergency Report or similar form. A copy should be retained by the leader.
- e. The leader shall direct search and rescue efforts until legally responsible search and rescue personnel arrive.
- f. All accidents, illnesses, or other serious incidents that require medical treatment, evacuation, other emergency response, or that compromise outings objectives shall be reported to the chairperson of the Chapter Safety Committee as soon as possible, using the Sierra Club Accident/Incident Report form. A copy of the Emergency Report (if used) should be attached.

3.4 **Outings Training** - Outings often require specific leadership and participant skills, good physical condition, and specific equipment. Because the analysis of accidents shows that the skill and experience of participants and leaders is the most important factor in prevention, it is the policy of group to encourage participants and leaders to develop appropriate skills and experience before undertaking more difficult outings. Such outings should first be undertaken only with experienced companions.

3.4.1 **Training Program** - The group shall provide training for leaders and participants for all outings which require special skills. Training for each kind of outing shall be planned by the leaders qualified to lead that kind of outing. Training plans shall be consistent with the participant skills required.

3.4.2 **Training Instructors** - Leaders qualified to lead an outing may schedule training activities in the same manner as any other outing, subject to the approval of the Safety Committee. In special circumstances the Executive Committee may establish additional qualifications for training instructors upon the recommendation of the Safety Committee.

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- 3.4.3 **Leadership Training** - The training of outings leaders shall be conducted by the Safety Committee or an appropriate subcommittee thereof, based on the guidelines in the Sierra Club Outings Leader Handbook. The training program, including the qualifications for instructors and the list of leaders authorized to act as instructors, shall be approved by the Executive Committee.
- 3.5 **Safety for Other Activities** - Activities other than outings can result in liability for the Sierra Club. The following precautions should be observed by those conducting such activities:
- 3.5.1 **Sign-In** - All participants shall sign in at the meeting place, giving the name and phone number of a person to contact in an emergency. Use of the standard group sign-in form is recommended but not required.
- 3.5.2 **First-Aid Training** - Leaders of social and similar activities should have first-aid training, preferably including CPR, and should have rehearsed methods of dealing with emergencies such as fire, earthquake, and sudden illness.
- 3.5.3 **Activist Training** - Activists likely to involve the Club in controversy should be encouraged to undergo appropriate Sierra Club training.
- 3.5.4 **Participant Training** - In the event of Sierra Club participation in hearings, protests or demonstrations, the leaders shall see that the guidelines for participation and limits of protest are made known to and discussed with the participants in advance.
- 4.0 **Enforcement** - The safety policy shall be enforced by the Executive Committee and the leaders of the group, under the administrative supervision of the Safety Committee.
- a. Leaders may reject prospective participants whom they deem unqualified for a given activity.
  - b. The group may refuse to sponsor activities proposed by leaders who do not comply with this policy.
  - c. The group may require that participants who do not comply with outings qualifications and conduct policies obtain additional physical or technical training or experience before being allowed on further group outings.

Before any leader or participant is disciplined, a hearing shall be conducted by the Safety Chair. The person whose conduct has been questioned shall be notified of the hearing and given opportunity to confront those making the complaint. Prior to this hearing, the Safety Chair shall endeavor to obtain all available factual information relating to the complaint. The proceedings shall be recorded and the results reported to the Executive Committee with recommended action.

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Table 1

Recommended First Aid Kit

Some items may be improvised or replaced by multiple-purpose equipment, especially for backpacking. Participants are expected to carry their own minor first-aid supplies and medications, as well as sunscreen and insect repellent.

<u>Item</u>	<u>Quantity and Size</u>	<u>Use</u>
Band-Aids	12 1-inch	Minor lacerations
Butterfly Band-Aids (or know how to make)	6 (various sizes)	Closing lacerations
Battle Dressing (or sanitary napkins)	2 4-inch	Large bleeding wounds
Moleskin or Molefoam	1/2 package	Preventing blisters
Needle	1 medium size	Removing splinters
Antibacterial soap or Tincture of Zepherin	1 oz plastic bottle	Mild antiseptic
Plastic razor or blade	1	Shaving before taping
Roller gauze	2 rolls 2 inch x 5 yards	Holding gauze in place
Safety pins	3 (1 large)	Fastening slings
Powdered electrolyte	1 liter size	Exhaustion and cramps
Gauze flats	6 4x4 inch	Wounds
Cloth tape	2 inch roll	Sprains, securing dressings
Triangular bandage	1	Slings, covering dressings
Elastic bandage	1 3 or 4-inch	Securing dressings
Thermometer	1 (-40°F to +120°F)	Measuring temperature
Wire mesh splint	1	Suspected fractures

Miscellaneous - Sign-in sheets, emergency and accident report forms, pencil and paper, coins for telephone.