

# 2020 OUTINGS LEADER COURSE

## OLT 101 Learner's Guide

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# SIERRA CLUB

### **Sierra Club Outings**

*Vision, Values, Program Goals*

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## Sierra Club Outings

### Vision

The Sierra Club envisions a just, equitable, and sustainable future where all people benefit from a healthy, thriving planet and a direct connection to nature. In this world, all people breathe fresh air, drink clean water, and regularly spend time outdoors, whether playing in their neighborhood park or trekking through untouched wilderness. Public health professionals champion time in nature to improve health and wellness. Children are encouraged to explore, play, and learn outdoors. People have access to a wide diversity of outdoor experiences, allowing them to find community, peace, and internal strength through personally fulfilling connections to nature. Public shared spaces outdoors help strengthen our families and communities. The physical, social, and mental health of our society is on the rise. This direct connection to nature forms the foundation of a broad, diverse, and powerful grassroots movement, from which a new generation of leaders is inspired to protect and restore our lands, waters, and wildlife while prioritizing communities most negatively impacted by climate change and a lack of access to nature and the outdoors.

### Values

1. 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
2. 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
3. We proactively engage marginalized communities and reach across economic lines and cultures to explore, enjoy, and protect the environment
4. We recognize marginalized communities as leaders in shaping the movement, value them as decision-makers, and center our work on their lived experience
5. 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
6. We value the transformational over the transactional and strive to develop long-term partnerships that share decision-making, resources, and power
7. 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
8. We practice the Jemez Principles at all levels of our organization: 1) be inclusive; 2) emphasis on bottom-up organizing; 3) let people speak for themselves; 4) work together in solidarity and mutuality; 5) build just relationships among ourselves; 6) commitment to self-transformation.

### Three major goals:

- Reduce barriers and expand access for all people to explore and enjoy nature
- Integrate outings and outdoor activities into Sierra Club culture, campaigns, programs, and activities at the national and local levels

- Establish clear pathways for engagement between outings and advocacy

## Lesson One: Course Introduction

### How to Use this Learner's Guide

Thank you for your interest and devotion to connecting participants with the natural world and furthering the Sierra Club's conservation goals. Volunteer outings leaders like you make all the difference. This course is designed to support and further prepare you to safely and appropriately represent the Sierra Club while you make a lasting impact on the lives of the participants. If you are already an experienced leader, we hope this course will round out and reinforce your skills. If you are less experienced, perhaps even a novice, we hope this course will help you develop your outing leadership skills.

*OLT 101 Learner's Guide*, is meant to support your learning and it supplements the electronic resources available on Campfire Community. Using this guide in conjunction with successfully completing the Web-Based Quiz is another way to complete the Outings Leader Training—Basic (OLT 101). It highlights core outings information that all Sierra Club leaders should know about Sierra Club Outings structure, and programs; leader requirements; planning and conducting an outdoor activity; safety management and emergency response; and policies, guidelines, and insurance issues for all outings, including specialized outings. This volume does not cover technical information and may not cover all the information that a local entity (a Sierra Club chapter, group, section, or other subdivision) requires that leaders have. Leaders should check with the appropriate Outings Chair to

ensure that they meet all the leader requirements for their entity.

Many books and training courses exist to help individuals and leaders hone their skills. Sierra Club Outings urges all leaders to seek further knowledge through these avenues, not only in their program but in others as well. Some recommendations appear in the Resources section at the end of this guidebook.

There is a wealth of Sierra Club training opportunities and resources available to outings leaders. Many local groups and chapters run their own Outings Leader Training—101 and Advanced (OLT 201), first aid training, and other types of training. Campfire Community will serve as the main online source of information for Sierra Club policies and guidelines on outings; as well as study materials, teaching plans, and answers to many frequently asked Sierra Club Outings questions.

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

- **Inspiring Connections Outdoors (ICO):** Sierra Club's Inspiring Connections Outdoors (ICO) program works with youth, specifically those who have been underrepresented or

have not felt welcomed in environmental and outdoor groups in the past. 800 outings in approximately 45 ICO groups host approximately 13,000 youth and adults annually.

- **Local Outings:** 15,000 chapter, group, and activity section outings serving approximately 250,000 participants annually. More than 5,000 Sierra Club Local Outings volunteers lead a range of outings that are as diverse as their interests from day hikes, peak scrambles, community building, bicycling, skiing, paddling, bird-watching, conservation-oriented activities, or forays into the remaining natural areas of our major cities.
- **Military Outdoors (MO):** Seeks to be at the forefront of a national movement to ensure every veteran has the opportunity to get outdoors when they return home after service. For many veterans, meaningful connections to the outdoors are a gateway to a new mission and continued service to the lands they swore an oath to protect. A Veteran can become a volunteer leader through their local Sierra Club outings group for long-term mentorship and leadership development. Since its inception in 2006, Military Outdoors has successfully worked with 70,000 service members, veterans, and their family members to go outside.
- **National Outings:** 350 paid tours and treks serving 3,800 participants annually. Sierra Club National Outings is overseen by the Outings Committee, which delegates much of its work to its eighteen subcommittees. Some of the

subcommittees offer trips in a particular geographic region (e.g., Alaska, Southwest, Rocky Mountains, Northeast), while other subcommittees run specific types of trips (e.g., International, Service, Water). Trip prices cover most of a leader's trip expenses, including travel to the trip and other miscellaneous costs.

## Leadership and Connections

Most members take their first Sierra Club outing close to home, participating in a chapter or group outing that they have read about in a Sierra Club newsletter or on the organization's website. These outings are good ways for people to connect with local green places, connect with each other, find calm and often lay the foundation for involvement in the Club's organization's conservation and movement building work.

Sierra Club Outings leaders can have a tremendous impact in many ways when leading outings. Whether leading a day hike to a local endangered area, a picnic in the park to build resilience, a conservation walk with a local elected official, or a backpacking excursion into the backcountry, leaders can inspire outings participants to work alongside each other and other local and national groups to make changes that can better protect the planet and each other. Sierra Club leaders may inspire participants to:

- Contact legislators to ask them to help protect a special place.
  - Become outings leaders who facilitate outdoor experiences that foster respect and inclusivity of all people.
- Volunteer with local groups to

encourage their city to become committed to 100% clean energy.

- Take on leadership roles within their local Sierra Club chapter or group.

### **Outing Leader Requirements**

The following requirements apply to all Sierra Club Outings leaders. Individual entities may have additional requirements for their leaders.

All leaders must:

- Be a Sierra Club member.
- Be at least 18 years of age. Youth leaders age 14-18 can lead Sierra Club outings with an adult leader present.
- Have first aid certification equivalent to or higher than American Red Cross Basic.
- Have completed the Outings Leader Training—Basic (OLT 101) or comparable training from a local outings entity. If OLT 101 is not available, then the leader must have completed the OLT 101 curriculum on his or her own.
- Have outing participant skills appropriate for the activities of the trip and toward the advanced end of the scale.
- Have provisionally led at least one outing and received a positive evaluation by the mentor leader.
- Receive approval to lead outings from the Outings Chair or a delegated authority of the entity sponsoring the outing.

In addition, leaders of outings that include an overnight stay away from cars (Level 2) must:

- Have successfully completed the Outings Leader Training Workshop (which includes OLT 101 and OLT 201) or comparable OLT 201 training from the local outings entity. If participation in OLT 201 cannot be arranged, then the leader must have completed the OLT 201 Self-Paced Course or the following portion of the OLT 201 curriculum on his or her own: safety management planning, trip planning, interpersonal leadership, and group management.
- Have provisionally led at least one outing that included an overnight stay away from cars and received a positive evaluation by the mentor leader.

### **Leadership Renewal**

Every four years from the date a leader first met all the requirements for leading an outing, regardless of level, the leader must complete OLT 101 again. Further, if a leader has not led a trip at a given level in the previous four years, then the leader must repeat the requirement of provisionally leading at that level or higher before leading an outing at the given level, or otherwise satisfy the entity Outings Chair that the leader continues to possess the requisite skills.

## **Lesson Two: Planning an Inclusive Outing**

*Have you ever heard of the Six Ps? Proper Prior Planning Prevents Poor Performance—that's what this lesson is all about!*

On the next 2 pages you'll start to familiarize yourself with the Sierra Club Trip Plan. This is used to design the outing and help you get it approved and publicized. Though you may already have a

trip plan you use, we've created this document to assist you in developing all of the details of your outing.

# OUTING TRIP PLAN

Name	Date	Trip Title
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**Outing Purpose Statement:**

**Conservation Topic:**

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Be sure to describe how you will implement your conservation topic.

**Outing Profile Statement:**

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Include outing date(s), type, location, distance, elevation gain/loss, duration, fees (if any), level of difficulty (how strenuous) and if there are specific outings considerations (exposure/wildlife/off-trail).

**Participant Profile Statement:**

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Include number of participants, participant focus (adult, single, family, minors), skill level (beginners/advanced) and equipment needed.

**Leader Profile Statement:**

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Include number of leaders, roles, experience or skills needed and any equipment needed.

**Outing Announcement:**

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Include trip date(s) and time(s), fees (if any), brief description of outing, difficulty rating, participant pre-requisites, leader name and contact information.

**Launch Talk\*:**

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Include the tone you plan to set for your talk, a welcome greeting, trail conduct, safety guidelines, conservation topics, and liability waiver information.

*\*Launch Talk formerly Trailhead Talk: We're trying this language on. We're trying to discourage "outings" becoming synonymous with trails and hiking. Our outings have evolved and we're trying to have more inclusive language that supports that.*

Map: (Paste a photocopy, hand draw, or cut and paste electronically)

**Document Checklist:**

- Launch Talk Card
- Sign-In Sheet and Liability Waiver
- Minor Medical Treatment Authorization
- Emergency Response Card
- Incident Report Form
- Emergency Response - Patient Report
- Safety Management Plan (if desired)
- Leave No Trace Cards (for participants)

**Ten Essentials Checklist:**

- Compass
- Extra clothing
- Extra food
- First-aid kit
- Flashlight
- Map
- Matches
- Sunglasses
- Water bottle
- Whistle

## Outing Concept

Defining your outing's purpose, and identifying the components of the outing, participant, and leader profiles are all key activities you'll want to document carefully before beginning any outing. The Trip Plan template will help you document and organize all of that information. It will also help ensure that you don't forget any important details.

## Outing Purpose

Each leader must define the purpose of the outing. The purpose could be to enjoy the outdoors, focus on conservation, build community, learn outdoor skills, or participate in something else of interest to the leader or the participants.

## ↗ Outing Profile

Where will the outing be and what activity will be done?

*Define the outing profile* by deciding on a location, the type of outing (e.g., backpacking, day hiking, kayaking), how rigorous the outing will be, and how long it will last. Remember: Leaders generally move faster than participants and some participants want to move slowly. Add time for unforeseen delays (environmental and human), breaks, hydration stops, taking pictures, and elevation gain and/or loss. If the outing will be conducted with other local organizations, see the Co-Sponsored Outings Policy, Appendix B.

## ↗ Participant Profile

Who do you want to join you?

*Define the participant profile* by estimating how many participants can safely take part in the outing, whether they will need special outdoor skills or experience, and

whether the outing will include minors.

Consider the following:

- Will the outing be strenuous or more leisurely? Will beginners be welcome or only seasoned participants?
- Will there be any unaccompanied minors on the outing? If so, they will need their parent or guardian to sign a waiver and a Minor Medical Treatment Authorization and Consent form. ICO has waivers that include both.
- Will the outing require special gear? What can you do to make the outing accessible to folks who might not have the required gear? Will you tell them where to rent it or will you be able to provide it?
- Will the outing attract new people? Not everyone enjoys hiking 20 miles in one day. Consider trips that include intergenerational options, nearby nature or activities specifically designed for people living with disabilities.

## Leadership Profile

*Define the leadership profile* by deciding how many leaders the outing will have, what each leader's role will be, and whether the leader(s) will need any special experience, conditioning, or equipment.

## Outing Approval

### Entity approval

Present the outing concept to the Outings Chair following the local entities' process and time protocols and follow the Chair's instructions to obtain authorization.

## ↗ **Restricted Outing Approval**

The following types of restricted outings require approval from the Program Safety staff at the National Office:

These include activities involving the following:

- Climbing Gyms
- Drones (UAVs)
- Mountaineering/Rock Climbing
- Watercraft
- Boat Charters
- Aircraft Charters
- Minors

To learn more, review the [Restricted Outing Approval Procedures](#) on Campfire Community.

OK, you've got the basics down now—the purpose and type of your outing, and details about the participants and leaders. Now let's talk about the specific location for your outing. Be sure to check with your local chapter or group for any advisories or restrictions that might be associated with the area.

### **Design Considerations**

#### **Location and Route Considerations**

Become familiar with the route and its location. When leaders consider the route they would like to take, they should keep their outing and participant profiles in mind. Also, check for location advisories or restrictions that might be associated with the area. Location advisories are established by local chapters and groups either to prevent outings to an area that is fragile, overused, or politically sensitive or to encourage outings to an area to raise awareness of local conservation issues.

### **Scouting**

Scouting a route allows you to look for

hazards as well as good places to take breaks, eat lunch, and enjoy interesting sights. If scouting is not feasible, use maps, guidebooks, other leaders, local sources, and other resources to obtain as much information as possible prior to the outing. It is always best if a leader can scout the location or route, to reduce the likelihood of unforeseen circumstances as well as to aid in emergency action and preparedness.

While scouting:

- Take notes: Write down the location of and travel time to every possible campsite, water source, alternate route, and land/water manager's recommended emergency procedures rather than just noting the intended sites and routes.
- Consider the environmental impact: What effect will the larger actual outing group have on the terrain and the environment compared to the smaller scouting "group"? What steps will you take to mitigate the impact?
- Consider aesthetic values: Where are the best vistas, flowers or murals?
- Consider cultural and historical information: What information can you share that speaks to the tribes who lived on the land prior to colonization? Or other historical information that will give a broader connection to the place?
- Consider the psychological effect of the sequence of sites and events: It is important to note where the difficult portions of the outing are. Do they come early or late in the outing? Are they adequately balanced with rest periods?
- Offer educational opportunities about the place you are visiting. Invite an issue expert to talk about the

conservation issues facing the area. Your local Sierra Club group is a good place to start.

### **Group Size**

Determine the appropriate outing group size by considering the following:

- The ability of the leader or leaders to safely and enjoyably manage a group in this terrain for this type of activity.
- Land agency restrictions and legal limits.
- The environmental impact of the group size.

### **Screening**

Pre-outing communication can also give the leader an opportunity to screen potential participants in terms of the appropriateness of the outing. Potential participants should be screened on the basis of group and individual safety. Leaders should make reasonable adjustments to the outing to allow interested participants to attend. Screening people to prevent participation in the outing is not the goal; the goal is to determine whether the outing is appropriate for the participant. If you turn someone away, please offer them an outing you think would help prepare them.

Participant screening is best done well in advance of your outing. If done on the day of your trip at your meeting location screening may present extra challenges, such as lack of privacy for sensitive discussions and lack of time for thorough discussions and decision making.

Accordingly, leaders should plan on taking the extra time needed to appropriately screen participants.

A leader may use the following criteria to screen participants and guide them to a more appropriate outing if necessary:

- **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 outings, such as off-trail travel, climbing, or whitewater paddling skills.
- **Equipment:** Participants should have the necessary equipment to participate in the outing safely, such as food and water, sturdy footwear, or a personal flotation device.

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

If a potential participant has a disability, there are additional criteria that must be considered; these are in accordance with the Americans With Disabilities Act (ADA):

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

### **Asking Good Questions**

Ask good, open-ended questions with the goal of obtaining as much information as possible. It is the leader's role to judge the

appropriateness of an outing for an individual, not to judge the participant by their appearance and equipment. Here are some principles of good questioning:

- Screening participants off outings is not the goal. Rather, the goal is to determine whether the outing is right for them. Consider framing the questions with “In order to assess whether this is the right outing for you, I want to ask you a couple of questions.”
- Asking a few good, open-ended questions solicits more information while putting the potential participant at ease. Open-ended questions tend to be the who, what, when, where, why, and how questions. They ask for more information than a simple yes or no.
- Remember, the goal is to obtain as much information as possible. Questions that generate simple yes or no answers do not provide much information. It will then be necessary to ask the potential participant many more questions, which could make both the leader and the participant uncomfortable.
- If an outing seems inappropriate for a particular participant, make sure to discuss any concerns with the participant away from the group in a discreet manner.
- A leader should create opportunities for participants to come to him or her privately to discuss sensitive health and fitness issues.
- Asking personal questions in front of the group will likely not result in honest answers (e.g., “Does anyone here have a history of heart attacks?”; “Who has absolutely no experience?”).
- Always honor the participant’s dignity.

## Sample Questions

### **Conditioning, stamina, and**

### **experience:**

The goal of these questions is to determine whether the outing is a good fit for participants physically. Here are some open-ended questions to help determine a participant’s conditioning and stamina.

- “What is your hiking [rafting/backpacking/skiing/etc.] experience?”
- “How often do you do this activity?” If the participant has never done it before, ask, “What sort of exercise do you do for good health?”
- “Have you done a hike of this length and duration before?”
- “How is your general physical condition? If you have any allergies or have had major injuries in the past, please come talk with.”

### **Equipment:**

The goal of these questions is to help ensure that participants have the appropriate equipment for the activity (and not too much). A leader should describe to newer participants the value of and reasons for appropriate footwear, raingear, etc.

- “I see you are here in sandals/tennis shoes. Have you done a similar hike wearing them before? Can you describe the last outing where you used these and how they functioned?”
- “Did everyone remember to pack food, water, etc.?” (See the Ten Essentials list, Appendix F)
- “Have you used this backpack [pair of boots/tent/sleeping bag/etc.] on an outing like this before, under what

conditions, and how did it work for you?”

- “Are you used to carrying this much/little in your pack? I know that this weight in your pack is okay right now, but think how it will feel 10 miles in and 1,500 feet higher. Is there anything you would rather leave in your car to lower your pack weight?”

### **Steering Participants to More Appropriate Outings**

It is best to get the participant invested in screening him- or herself into a more appropriate outing if they find they are ill equipped for the one planned. The leader should paint the real challenges of the outing and how the participant’s fitness or equipment may prevent him or her from having a safe and enjoyable outing. Here are some ways to discuss the suitability of the outing and to suggest alternative outings:

- “Generally this outing is more appropriate for people who are able to hike longer distances [for a longer time/at high elevations/in inclement conditions].”
- “I am concerned that this outing may be too long [hard/strenuous/etc.] for you and will not be enjoyable.”
- “Though this hike does not seem like a good fit for you, Layla is doing a great hike on Sunday that I think you might enjoy.”

If the leader believes that the outing is not appropriate for the participant due to fitness, experience, or equipment concerns and the participant does not agree, the leader has the authority and responsibility to deny participation in the outing. If possible, the leader should document this

conversation. The leader should also encourage the participant to attend a future, more appropriate outing.

### **Route/Location Change Considerations**

When considering any changes to the planned route or location, either before or during the outing, be sure to consider the impact of these changes on the difficulty of the outing, participant expectations, and the safety management/emergency response plan. If a route/location change materially affects the difficulty of the outing, participants must be notified, further screening and/or discussion should be considered, and the safety management/emergency response plan should be reexamined.

### **Permits**

Make sure to always obtain the required permits. In addition to the wilderness or backcountry permit required of most recreators, Sierra Club Outings that charge fees that are more than direct field costs may also need to apply for a special-use or commercial permit. These outings are considered to be commercial outings by land-management agencies. Contact the relevant land-management agency (e.g., National Park Service, state park, Forest Service, or Bureau of Land Management) to find out whether the outing requires a special-use or commercial permit in addition to a standard wilderness permit.

### **Charges**

It is allowable to charge outings participants for expenses incurred in the conduct of an outing. These charges should generally be limited to reimbursement of field expenses so that the outing is not considered a

commercial outing. **In all cases, the outings leader should contact the appropriate land agency manager to verify that proposed charges are consistent with noncommercial use.**

Direct field expenses are expenses that participants would have incurred had they gone on the outing on their own. They include:

- Transportation to the outing location
- Consumable food and supplies used on the outing
- Concessionaire expenses for services such as transportation
- Lodging

The following factors can give the appearance that the outing is a commercial venture and should be avoided, unless specifically approved by the appropriate land agency manager:

- Charging for expenses such as leader wages, leader travel, a leader honorarium, advertising, overhead, or equipment depreciation
- Setting a price close to that for an equivalent commercial outing or a price that is in itself high

### **Participant Payments and Leader Reimbursements**

Checks paid by participants for outing expenses and/or outing fees **should always be made out to the Sierra Club**, not to the individual leader. Participant money received should be deposited by the entity's treasurer in the entity's outings bank account. Participant money received

may not be withheld by the leader for the purpose of expense reimbursement.

It is an acceptable standard practice for leaders to incur out-of-pocket expenses and obtain reimbursement from the entity treasurer. .

### **Transportation**

Determine the following when making transportation plans:

- Where is the meeting place?
- How will the group get to the outing location?
- Will carpools be used?

↗ **Important:** The Sierra Club insurance policy does not cover drivers, vehicle owners, or passengers.

### **Individual Leader Roles and Responsibilities**

All outings that involve a group moving from point A to point B should have someone designated as "point" and someone designated as "sweep." Either an outings leader or a capable and trustworthy participant can be designated as point or sweep. The point keeps track of the route and sets an appropriate pace. The sweep brings up the rear and ensures that no participant is left behind.

The point and the sweep should carry a method of emergency communication, such as whistles should the need arise. Also, make sure the sweep is carrying a first aid kit to ensure that resources are quickly available in the event of an injury.

↗ **Count, count, count** the outing participants throughout the day.

## Lesson Three: Final Preparations and Communications

### Outing Publicity

All Sierra Club outings should be publicized. The Outings Chair can provide leaders with entity publicity guidelines. In addition to the local entity newsletter, web site and Campfire Events used to notify Sierra Club members of outings, consider other avenues for publicizing outings—especially if participation is dwindling. Publicize outings in a wide variety of publications so different groups of people know about the outings.

### Outing Announcement

The outing announcement should be as unambiguous as possible and should contain the following information:

- The outing date and cost, if any
- A brief description of the outing and destination
- Alternative transportation info: “We’ll be meeting in the Safeway parking lot near bus route 26 at 7:00am. Carpooling available for those interested.”
- The difficulty rating in unambiguous terms (if the local entity has a rating convention, use it)
- Any prerequisites for participants (such as experience, conditioning, gear, and specific skills)
- The leader’s name and phone number or email address (so potential participants can ask questions before the outing)

### Liability Waivers

Wherever outings are publicized, there must be a notice that advises participants of the need to sign a liability waiver. Chairs

or Outings Chairs of a Club entity that runs outings must contact the appropriate editor or webmaster about the importance of such a notice. Here is the suggested notification language:

“All participants on Sierra Club outings are required to sign a standard liability waiver. If you would like to read the liability waiver before you choose to sign up or participate in an outing, to Campfire Community.

✦ Please note: Campfire Events includes a feature for participants to RSVP for an event and sign an electronic waiver.

### Pre-Outing Communication

Prior to the outing, a leader should be available for questions. This can be done by listing a phone number or email address in the outing announcement or by organizing a pre-outing meeting and publicizing it in the announcement. The goal should be to ensure that potential participants understand what the outing will be like and how they should prepare. For certain outings, a leader may also want to provide a brochure or equipment list. When talking with potential participants, remind them that they are required to sign a liability waiver. If an unaccompanied minor wants to participate in an outing, a Minor Medical Treatment Authorization and Consent form will need to be signed by a parent or guardian in addition to a liability waiver.

### Outing Cancellation

If it becomes necessary to cancel the outing, all outing participants should be notified as

soon as the decision is made. The leader should make sure to update the website and refund any outings fees (if collected). If the outing is canceled and the leader chooses to lead the same or a

## Lesson Four: Conducting an Outing

### Trail Etiquette and Protocol

Make sure leaders and participants understand these points before the outing begins:

- The point is always in front; the sweep is always at the rear.
- The point or sweep should immediately notify the leader (if the leader is not the point or sweep) when someone insists on going forward or staying behind.
- Always stop at trail junctions and either wait for the rest of the group or, less preferably, ensure that the group member behind the leader knows which way to go.
- Assemble the entire group at least every one to one and a half hours, preferably more frequently.
- Keep the trail clear when stopping for breaks.
- When “nature calls,” tell participants to inform another group member or to leave their pack near the trail so that the sweep will not leave anyone behind.
- Stay on the trail and never cut switchbacks.

### Layover Days/Outings With Significant Free Time

Even though it is common to have down time, or “free days,” on longer outings, leaders are still responsible for the participants. Communicate the time frame

similar outing as a non-Sierra Club activity (“go private”), all outing participants should still be notified that the Sierra Club outing has been canceled and all fees refunded.

and boundaries to participants before the free day.

- Ensure that the leader knows where participants are going and when they will return.
- Consider whether a buddy system is appropriate for the activity.
- Do not sign participants out—participants may not sign out and then sign back in later in the outing. The Sierra Club is responsible for participant safety and behavior for the duration of any outing. From a legal perspective, our attorneys have stated that a temporary sign-out would not provide any significant legal protection to the Sierra Club or a leader in the event of an accident.
- All activities should have a planned itinerary and time frame known to the leader.

### Group Gear/Extra Supplies

Being a good and prepared leader means you have enough supplies for yourself and also for the person whose equipment fails or for an item that might get lost or left behind. There are many variations of the “essential” items to carry, depending on the outing and the environment. Listed below are the concept-based Ten Essentials as adapted from the Mountaineers’ *Mountaineering: The Freedom of the Hills*. This is a good starting list of what a leader should consider bringing:

1. Navigation equipment (map and compass)
2. Fire (matches or lighters)

3. Signaling device (whistle or mirror)
4. Sun protection (sunglasses and sunblock)
5. Insulation (extra clothing)
6. Nutrition (extra food)
7. Hydration (extra water and/or the means to purify more)
8. Illumination (flashlight/headlamp)
9. First aid kit (see below)
10. Emergency shelter (trash bag/bivy sack/tent)
11. Bonus: Outing-specific repair kit (bike/raft/etc.), including tools

### First Aid Kits

Leaders must bring a first aid kit on outings. This kit should include all the items necessary to address common needs, such as wound management.

#### First Aid Kit Content Considerations

- Number of people who may require care
- Number of days the kit will be in use
- Distance from definitive medical care
- Environmental considerations (cold, heat, altitude, endemic diseases)
- Availability of rescue (helicopter, ambulance, pack animal, etc.)
- Pre Existing medical problems of group members
- Leader medical expertise and/or expertise of other group members
- 

### Safety Management and Emergency Response Planning

Safety planning is not just a task to check off on the “leadership checklist.” Safety management is a state of mind and should be infused throughout the planning process for the outing. Leaders also need to make the participants aware of any risks associated with the outing. Good outing planning and

anticipating potential incidents are the best ways to prevent an emergency.

### Information to Collect

**Hospitals:** Know the locations of nearby hospitals and how to get to them.

**Ranger stations:** Know the locations of park ranger stations and if/when they are staffed.

**Phones:** Note the locations of nearby pay phones; determine whether cell phones work reliably in the area. It is generally not a good idea to rely solely on cell/satellite phones as a critical part of the outing’s safety management/emergency response plan. For longer, remote outings, consider using Satellite phones, SPOT devices, or InReach if you will not have reliable cell phone service or a way to keep your cell phone charged.

**Search and rescue:** Note the contact information for the relevant providers of this service (e.g., park rangers) and, most importantly, find out under what circumstances they will provide assistance and evacuation.

### Emergency Contact Information and Participant Medical Forms

Emergency contact information should be obtained from outings participants before the outing begins (the Sign-In Sheet and Liability Waiver includes a column for this). For overnight/multi day outings and more rigorous activities, both participants and leaders should fill out Medical Forms to help in the pre-outing screening process. Leaders should then carry the completed Medical Forms with them in the field. (Medical Forms are not necessary for most day trips.)

## Forms

### Liability Waivers

All outings participants must sign a liability waiver prior to participation in any Sierra Club outing. A Sign-In Sheet and Liability Waiver is easier to keep track of than individual waivers. However, individual waiver forms are available and may be sent during pre-outing correspondence (usually used for longer outings).

In the rare cases in which waivers are prohibited by government land agency regulation, all participants must sign an Acknowledgment of Risk form in place of a liability waiver.

### Minor Releases for Unaccompanied Minors

If an unaccompanied minor is on the outing, the parent or guardian must complete the Minor Medical Treatment Authorization and Consent form in addition to the liability waiver.

### Medical Form

If you are leading a rigorous, multi day outing, use the Sierra Club's Medical Form. The Medical Form is designed to be used by outing leaders to find out in advance about special medical conditions participants may have, rather than learning about them in a crisis. Convey to participants that medical information is kept confidential and is seen only on a "need-to-know basis" and only by the outings leader, medical professionals, or others who understand the confidentiality of the information. You can also review the How to Use the Medical Form document on Campfire to learn how to

read participant answers on the form and ask your participants better questions.

## Transportation

### ↗ Carpooling

Carpooling is defined here as the use of participant-owned vehicles, or a combination of participant-owned and leader-owned vehicles, for transportation to, from, and during Sierra Club outings. Such outings officially begin at a trailhead our launch site. *Carpool transportation is at the sole risk of the participants*, both driver and passengers, even if they are the leaders or staff of the outing or activity. If carpooling is to occur, **the leader is responsible for ensuring all of the following:**

- Participants must be advised in advance that the Club assumes no responsibility for carpools.
- Leaders must not assign which cars participants ride in. Leaders must limit their involvement to making participants aware of who needs and who is offering a ride. (This precaution limits exposure to liability as a result of carpooling activity.)

### Leader-Provided Transportation

If transportation is part of the outing (e.g., a bus trip or other leader-arranged transportation), the outing begins at the point where the participants board the vehicle. **The leader is responsible for ensuring the following:**

- The driver must have proof of auto insurance that meets the minimum liability and collision coverage requirements for the state in which his or her car is registered.

- If the vehicle requires a special license to be operated, the procedures for passenger buses, Appendix G must be followed.

### \*Launch Talk

All Sierra Club outings should begin with some kind of talk where the outings leader welcomes the participants, sets the outing expectations and tone, and provides the opportunity for participants to ask any questions. In addition, the leader will explain conduct or safety issues, get waivers signed, introduce a conservation topic, and mention any other relevant topics. See the Launch Talk card in the Forms section, Appendix I.

### Leave No Trace Principles

Leave No Trace outdoor ethics is an approach for responsible use of the outdoors that minimizes the impact of outdoor activities. The main principles are as follows:

- Plan ahead and prepare.
- Travel and camp on durable surfaces.
- Dispose of waste properly.
- Leave what you find.
- Minimize campfire impacts.
- Respect wildlife.
- Be considerate of other visitors.

### ✈ Whom to Call During an Emergency

When the outings group is able to communicate with the outside world, contact the appropriate authorities:

- Front-country emergencies (less than one hour from help): Contact the local emergency medical system (e.g., 911).
- Backcountry emergencies (greater than one hour from help): Contact the local search and rescue team (using the information in the safety

management/emergency response plan) as well as the emergency medical system.

### Life-Threatening Emergencies or Fatalities

After contacting the appropriate authorities, contact the Sierra Club Outings Department as soon as possible, at:

**1-888-OUTINGS** (1-888-688-4647) for domestic calls

**001-715-852-1701** for international calls

Outside of normal business hours, the message at 1-888-OUTINGS directs the caller to 1-800-564-6861. This number is always monitored by the Sierra Club's answering service. The caller provides basic information regarding the emergency and is then put on hold for several minutes while a staff person is located.

### On-Outing Issues

#### Lost Participant

If someone on an outing becomes lost, follow this Sierra Club protocol for finding lost participants: **A search for lost participants will not begin after dark unless there is good cause for alarm, and searching will not begin (or resume) until eight o'clock the next morning.** This protocol should always be mentioned in the Launch Talk.

#### Problem Behaviors on an Outing During an Outing

It is important to immediately address the problem behavior with the individual(s).. 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 for the outing to continue. Be clear about these expectations. Pull the individual(s) 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 them, do the following:

- Identify the inappropriate behavior.
- 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 individual back into the group with a sense of purpose and belonging (give them a task).

### Leaving an Outing Early

It is the leader's job to keep track of participants from the start of an outing to the end. If a participant wishes to depart from the group before the end of the outing, the leader must make sure the participant is signed out. If the outing is using the Sign-In Sheet and Liability Waiver (see Forms on Campfire), then simply ask the participant to initial the "Early Sign-Out" column. If the outing does not use a sign-in sheet, ask the Outings Chair in advance for the sign-out procedure for the outing program. **Participants may not sign out and then sign back in later in the outing.** If the leader thinks the person's safety is in jeopardy, the leader should assertively try to dissuade the participant from leaving. If the person is determined to leave anyway, the leader should try to find

a way to get the person back safely, either by finding an escort or by rerouting or ending the outing.

### Ending an Outing

Before everybody goes home, make sure to take care of these details:

- Double check the sign-in sheet or outing roster to ensure that all participants are accounted for.
- Distribute outing evaluations to all participants if the outing-specific entity uses them.
- Invite non-members to join the Sierra Club. Have membership brochures available.
- Distribute any other Club materials available, particularly ones related to the outing's conservation message.
- Ask participants if it is okay for a leader and/or the Sierra Club to contact them in the future.
- Make sure everyone has a way home.
- Thank participants for their participation and invite them to join a Sierra Club outing again.

### After an Outing or As Soon as Possible Reporting Accidents and Other Incidents

Incidents on Sierra Club outings must be reported immediately using the [online Incident Report form](#). The Incident Report provides the Club with the information it needs to follow up with the leader and relevant participants. Incident reports also allows the Club to develop an understanding of incidents throughout the outings programs and identify changes that should be made to policies and training.

An [Incident Report](#) **must** be filed for:

- A fatality
- Any incident that requires search, rescue, or evacuation

- Any injury that requires advanced first aid
- Any injury that could have future complications or require medical attention after the outing (e.g., an animal bite or a severe sprain)
- Any act of suspected sexual harassment or child abuse
- Any act that violates the law

**An Incident Report *can also be* filed for other issues, such as behavioral issues, psychological concerns, gear damage, animal encounters, early departures/evacuation, near misses, safety concerns, etc. Check with your entity chair for such additional entity reporting requirements.**

### **Document Retention**

All signed liability waivers, acknowledgment of risk forms, and Medical Forms must be kept on file by the sponsoring entity. As of 2004, documents should be kept on file for at least six and a half years. The entity's Outings Chair should provide guidelines for doing this.

For restricted outings, liability waivers and Medical Forms must be sent to the Sierra Club Program Safety within 30 days of the end of the outing.

### **Additional Ideas**

#### **Land Agency Report**

If the outing required a special-use or commercial permit, file the required post-outing report with the land agency.

#### **Outings Chairs**

With all things outings-related, a leader should always consider the chapter, group, or activity section Outings Chair to be their primary

resource for outings information. The Outings Chair is responsible for the following duties:

- Recruiting leaders
- Setting leadership and training requirements
- Communicating with and managing leaders
- Soliciting, reviewing, and approving outings proposals
- Managing finances
- Addressing complaints and problems
- Ensuring leaders follow Sierra Club policies and requirements
- Reporting incidents and managing risk on outings
- Keeping records
- Planning for succession

### **Leader and Event Recording System (LEADERS)**

LEADERS is designed to help Outings Chairs and their designees manage their outings program. The system helps track certifications, local and national trainings, provisional leads, and administrative roles for outings leaders. It is accessible via a web browser and can be used by any Outings Chair, ICO chair, or designated records manager. The system is completely integrated with the Sierra Club's membership database, so any contact information entered will update Sierra Club records.

### **Web Interactive Leader Directory (WILD)**

WILD ([www.tioga.sierraclub.org/Wild/](http://www.tioga.sierraclub.org/Wild/)) stores the contact information of Sierra Club leaders nationwide. Information about Outings Chairs and National Committee members can be found on WILD.

### **Leadership Resources**

There is a wealth of technical and leadership training resources available both in- and

outside the Sierra Club. Several of the written resources that are used during national training events include:

- Outdoor Leadership, by John Graham

- A Backpacker's Field Manual, by Rick Curtis
- The AMC Guide to Outdoor Leadership, by Alex Kosseff

## Sierra Club National Office Contact Information

### Sierra Club Outings

2101 Webster St., #1300  
Oakland, CA 94612  
Fax: 415-977-5795

### Local Outings

Phone: 415-977-5528

Email: [local.outings@sierraclub.org](mailto:local.outings@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/outings/local-outdoors>

### Outdoor Activities Training

Email: [outings.training@sierraclub.org](mailto:outings.training@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/outings/outings-wide-resources/training-0>

### Inspiring Connections Outdoors (ICO)

Phone: 415-977-5568

Email: [ico@sierraclub.org](mailto:ico@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/outings/inspiring-connections-outdoors>

### National Outings

Phone: 415-977-5522

Email: [national.outings@sierraclub.org](mailto:national.outings@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/outings/national-outings>

### Military Outdoors

Phone: 202-675-2397

Email: [rob.vessels@sierraclub.org](mailto:rob.vessels@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/outings/military-outdoors>

### Program Safety

Email: [program.safety@sierraclub.org](mailto:program.safety@sierraclub.org)

Campfire Community Link:

<https://community.sierraclub.org/section/capacities/operations/safety-security-and-emergency-preparedness>

**Notes and Comprehension:** Use this section to take notes about areas of extra importance. You'll be able to use this notes page and the guide when taking your online test.

Lesson One: Course Introduction	
Lesson Two: Planning Your Outing	
Lesson Three: Final Preparations and Communications	
Lesson Four: Conducting Your Outing	