

Provisional Outing Checklist for Trainees and Mentors

This checklist is to be used by outings leader trainees and their mentors in planning and conducting provisional outings. It is simply a guide to facilitate communication and is not intended to be comprehensive – for information on how to conduct a Sierra Club outing, please refer to Campfire Learning and/or Campfire Community.

Before beginning to plan this provisional outing, a trainee must have completed the *Outings Leader Training* (OLT) and co-led at least one outing with an experienced, certified leader.

Preparation

- ❑ For your provisional outing, choose an activity and location that you know well, such as a hike that you have done several times. This outing should be well within your ability and endurance limits, not one that challenges you physically. You are advised to conduct your outing where you have consistent cell phone coverage throughout, so that it is considered a “front country” outing and you won’t have to complete a safety management plan or ask your participants to fill out medical forms.
- ❑ Scout the outing. As you scout the outing, imagine that you are leading a group of people, making notes of important features and potential challenges: parking/transit, exact meeting location, restrooms/water availability, trail junctions, hazards, lunch and/or rest stops. Check for cell phone coverage periodically, to determine if your outing is “front country.” Become familiar with land agency rules, such as those regarding group size or dogs.
- ❑ Write a draft of your outing announcement. Read outing descriptions on the RS or SC calendar as models, noticing the types of information that need to be included. Send your draft announcement to your mentor for feedback. When the announcement is complete, the mentor will post it on Campfire Events. The trainee should be listed as the primary leader with the mentor as co-leader.
- ❑ Once the outing has been approved by the Outings Chair, it may be posted on Meetup. You are advised *not to announce* the outing until members have received the weekly “Upcoming Events” email, which gives them a chance to RSVP before non-members.
- ❑ Prepare a note card or cheat sheet for your Pre-Trip Talk. See below for topics to include, and consult with your mentor as needed.
- ❑ During the week prior to your outing, check the weather forecast periodically, and communicate with participants about any additional preparation needed.

Conducting the Outing

- The mentor should carry a first aid kit, and the trainee should also if they have first aid certification.
- As primary leader, the trainee should take the initiative on the following, and may turn some of these tasks over to the co-leader. Don't hesitate to ask the co-leader to help!
 - Arrive 10–15 minutes before the stated meeting time.
 - Greet participants as they arrive; identify yourself as the leader.
 - Pass around the waiver/sign-in sheet.
 - At the stated meeting time, gather participants into a circle for your Pre-Trip Talk. (See below for topics to include in the talk.)
 - Point and Sweep. The trainee should act as point for most of the outing, with the mentor as sweep. The sweep should carry the sign-in sheet in case anyone needs to sign out.
 - At the end of the outing, gather the group once again to formally end the outing. Identify non-members and invite them to join RS and the SC.

After the Outing

- The primary leader must keep the sign-in sheet(s) for seven years. Please scan and send it to the Outings Chair, who maintains digital backup copies.
- The mentor will submit a brief summary of the trainee's performance to the Outings Chair, who will enter the information in the LEADERS database and will propose the trainee's approval or disapproval to GovCom at their next meeting. First aid training must also be completed before approval.
- Once the trainee is approved, the Outings Chair will update LEADERS once again, giving the newly certified leader access to Campfire Events. If desired, the new leader can also become a Meetup Event Organizer.



This information should be presented before every Sierra Club outing. While some topics may require less detail on a short day hike, each topic should be covered. The information can be presented in any order, and some topics may be covered during pre-outing communication.

1. Welcome and Introductions
 - Gather the group together and introduce yourself/other leaders.
 - Set a welcoming tone by asking participants to introduce themselves, and tell their preferred pronouns and where they are from. Consider an ice-breaker or “fun fact.”
2. Roles and Expectations
 - Explain the leader's role and responsibility to the group.
 - Set or reaffirm the leader's expectations for the outing.
 - Ask participants for their expectations and concerns.
3. Complete Paperwork and Sign Waivers
 - Present the liability waiver, and make sure that all participants sign it. They should have an opportunity to read it before signing.
 - Be sure to have medical authorization forms for all unaccompanied minors.
4. Land Acknowledgement: Recognize the original inhabitants of the area.
5. Conservation Message
 - Introduce the issue you plan to discuss, materials you plan to hand out, etc.
6. Route Plan and Conduct Along Route
 - Describe the day’s route and travel plan.
 - Designate “point and sweep” and set rules for group travel, e.g. stop at intersections.
 - Explain "Pack it in/Pack it out" and other Leave No Trace highlights that apply to your outing.
7. Safety Issues
 - Explain what to do if separated from the group.
 - Describe the inherent and environmental risks involved in this activity.
 - Make sure all participants are comfortable with the risks.
 - Explain why hydration is important.
8. First Aid
 - Inform participants as to which leader carries the first aid kit.
 - Ask if anyone has medical issues that you should know about – request that they discuss it with you privately.
 - Describe proper foot and blister care.
9. Equipment and Water/Food
 - Make sure that all participants have proper clothing, gear, water, and food.
10. Answer any last-minute questions, and then set out!

Ending an Outing

- Check the sign-in sheet or trip roster to ensure all participants are accounted for.
- Invite non-members to join. Have Rainbow Sierrans cards and SC brochures with you.
- Make sure everyone has a way home.
- Thank them for their participation, and invite them to join a future outing.

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