

Reopening Outings: Which Forms to Use Cheatsheet

- **Frontcountry** is defined as being able to access a medical facility in under 60 minutes (including travel back to the vehicles) or being within a 911 call area.
- **Backcountry** is defined as being able to access a medical facility in 60+ minutes (including travel back to the vehicles).
- Conditioning hikes or activities either frontcountry or backcountry with repeating similar activity type, context, size and scope can apply for [an enduring waiver](#).

Chapter/Group/Section Outings (aka local outings)

I'm leading a . . .	Do I need to complete a Safety Management Plan?	Do participants need to complete a Medical Form?	Do participants need to provide proof of vaccination or a Negative PCR test?	Other forms needed
Day trip (frontcountry outside)	NO	NO	NO	Participant Agreement (waiver)
Day trip (frontcountry inside)	NO	NO	NO *masks or distancing required	Participant Agreement (waiver)
Day Trip (backcountry outside)	YES Safety Management Plan (SMP) GoogleDoc , PDF , Word	YES medical form	NO	Participant Agreement (waiver)
Day Trip (backcountry inside)	YES Safety Management Plan (SMP) GoogleDoc , PDF , Word	YES medical form	NO *masks or distancing required	Participant Agreement (waiver)
Overnight/multi day (frontcountry outside)	NO	NO	NO	Participant Agreement (waiver)
Overnight/multi day (frontcountry with indoor components such as sleeping, meals, etc.)	YES Safety Management Plan (SMP) GoogleDoc , PDF , Word	NO	YES	Participant Agreement (waiver)
Overnight/multi day (backcountry outside)	YES Safety Management Plan (SMP) GoogleDoc , PDF , Word	YES medical form	NO	Participant Agreement (waiver)

Overnight/multi day (backcountry with indoor components such as sleeping, meals, etc.)	YES Safety Management Plan (SMP) GoogleDoc , PDF , Word	YES medical form	YES	Participant Agreement (waiver)
--	---	-------------------------------------	-----	--

Medical Form

Why do we need one?

A [Medical Form](#) (How to Use the Medical Form) is an essential tool for evaluating participant health profiles. There are a range of practical, useful, industry, legal, and group management reasons that define a medical form as a core responsibility of group leadership in a simple, practical tool. Medical Forms are a core element of a high quality program that prioritizes safety.

Medical Forms allow leaders to better:

- Evaluate/Assess ability, limitations, participation for the outing activities, location, and difficulty.
- Identify specific individual needs, abilities, and relevant history and health.
- Allow personalized accommodation.
- Plan and prevent incidents and potential issues.
- Assess individual risk and how it impacts group risk.
- Respond and apply informed first aid.

How do we use the form?

- Request Participants fill-out form, ideally pre-trip. Leaders should also fill-out form.
- Review form, identify potential risks/limits, follow up with participants as appropriate.
- Keep form handy during trip, keep a copy in FA kit waterproofed in ziplock bag along with group forms.
- Keep forms and information secure and private.
- In the event of an incident, refer to forms or pass along to Emergency Responders.
- Communicate use of forms and location to group/assistant leader so they can be used by group in case of leader incapacity.
- Destroy forms upon completion of outing.

Safety Management Plan

Why do we need one?

Safety Management Plan (SMP) ([GoogleDoc](#), [PDF](#), [Word](#), [Example Safety Management Plan](#)) are a standard method of planning the safety and emergency management response during any outing. These plans outline the details, actions, and responsibilities involved with managing emergency situations and secure the resources in place necessary to conduct a strategic, considered response to the range of incidents possible on a given outing.

Safety Management Plans (SMP) allow leaders to better:

- Detail relevant emergency contacts and resources such as medical, police, fire, land agency, and evacuation.
- Plan with leadership team all roles and responsibilities.
- Plan with vendors, outfitters, and concessionaires all roles and responsibilities.
- Think through all possible scenarios to reduce surprises and for overall preparation.
- Share with staff and Outings Chairs to help manage an incident response.
- Empower assistant leaders and group members to conduct emergency response in case of leader incapacity.

- Have a pre-made plan to rely on that streamlines decision making in stressful moments and allows for faster adaptation to changes.
- Plan, trigger, execute, and manage a safe, successful evacuation.

How do we use the form?

- Fill out form completely to cover all possible contingencies
- Share with Outings Chair
- Completed SMP can be used as part of Outing approval process
- Leaders can keep copy among leadership team, notify other group members as necessary to conduct emergency response in case of leader incapacity.
- Use as reference to inform future and other trips, to help train new leaders to itinerary and area.

A few questions answered:

- **What is a partner?**
Many Sierra Club groups go outside with partner organizations like NAACP, Churches, schools, etc. If you are not working with a partner, leave this space blank.
- **What does land/water management contact refer to?**
If your trip is on public or private lands, an agency or a person manages the area. So the contact might be the park ranger, Bureau of Land management, County Parks Division, city or county Department Of Recreation And Parks, etc.
- **How will I know where my cell phone gets a signal?**
When you scout your trip, you can check on cell phone connectivity. You could also call the water/land agency manager and ask them. They are generally a great resource as well as a good person to get to know. You can also use apps like Cairn which can show cell service areas.
- **How does one find out where the closest ambulance comes from?** You should be able to look at the public/private land info, GoogleMaps, or the ranger station/info to get an idea where the closest ambulance will be coming from. Remember response times can vary greatly in rural areas that depend on volunteers.