

## Section III

## Outing Nuts and Bolts



# Outings Leader Job Description

## Responsibilities

- Maintains current Sierra Club membership
- Is familiar with the Outings Leader Handbook and all relevant Club policies and procedures (national as well as local)
- Minimizes risks to safety of participants (this includes proper screening before an outing)
- Conducts outings legally and in a manner consistent with Club policies and ethics
- Has sufficient technical, first aid, and leadership experience to safely conduct the types of outings he or she leads
- Maintains current leadership and first aid certifications as required by local policies
- Integrates conservation, advocacy, and membership recruitment into outings whenever possible

## How to Write Up an Outing

Wondering about that magical formula for outing write-ups? Never fear! This step-by-step guide will help you prepare fabulous, enticing write-ups.

### *What should my write up include?*

- Event's name, date, time, location and where to meet
- Outing rating (using our nifty number-letter-number system)
- Leader names and contact information
- Any fees or gear required, e.g. parking fees at State Parks, flashlights for night hikes
- RSVP information, if one is expected
- Carpool information, if applicable
- Brief description of the event

An effective write up gives the reader a feel for the hike's location and difficulty, without overwhelming him or her with too many details (such as a "hill by hill, turn by turn" account).

### *What happens to the write up once I turn it in?*

Your write will appear in the Ventana GLS newsletter, *Get OUT!* and on our Web site. Our outings chair will also be happy to make your listing available to *The Ventana*, the Ventana Chapter's newsletter. Please note that *The Ventana* is published on a different schedule than *Get OUT!* and so you will need to turn in those write ups significantly earlier.

You might also want to submit your write ups to Loma Prieta GLS's outings chair for inclusion in their newsletter, *The Wild Side*, and their Web site.

### *How should it look?*

For *Get Out!*, *The Wild Side*, and their web equivalents, please use the following format:

Line 1: Day of week, Date, Time  
Line 2: EVENT TITLE (in capital letters)  
Line 3: Event Rating

A few sentence description of event, list of any special equipment or fees, names of leaders and their contact information.

Example:

**Wednesday, October 9, 5:30 PM**

**WEEKNIGHT TRAINING HIKE: UPPER WILDER / GRAY WHALE**

**Rating: 2A2**

Join Wen and Marcia in one of our favorite hiking spots. Upper Wilder Ranch is "the other side of Wilder," quieter and a little less traveled than the area near the main entrance. We'll walk 5-6 miles, with a few hundred feet of elevation loss/gain. Wear boots or sturdy sneakers with tread. Bring water, a snack, and a flashlight (it's likely we will return in the dark, so check those batteries). Meet at the trailhead off Empire Grade Road. Contact leaders for directions. Leaders: Marcia Quackenbush (quam@etr.org), Wen Minkoff (wen@cats.ucsc.edu).

For *The Ventana*, please keep your write up to fewer than 50 words, including contact information.

Line 1: Type of outing: Location of Outing/Outing Name

Short description of outing, including level\* and leader information\*\*.

Example:

**GLS Hike: Upper Wilder**

Easy 5-mile hike with a few hundred feet of elevation gain. Wear boots or sturdy sneakers. Bring water, a snack, and a flashlight. Meet at the trailhead off Empire Grade Road. Contact leaders for directions. Leaders: Marcia Quackenbush, 555-5555, e-mail: quam@etr.org; Wen Minkoff, 555-5555, e-mail: wen@cats.ucsc.edu.

\* *The Ventana* rating system is as follows:

**Walk:** 2-5 miles, leisurely pace

**Easy:** no more than 5 miles a day; slight elevation gain, easy pace.

**Moderate:** 5-10 miles a day; up to 2,000 ft. elevation gain; 1-2 1/2 mph, boots and better than average fitness required.

**Strenuous:** Distance variable; may involve off-trail hiking; demanding pace; for experienced hikers in good condition only.

\*\*Leader information should follow the following formula:

Leader: Dorothy Dyke, 555-5555, e-mail: awesomehikeleader@wohi.com

## Leave No Trace

The Sierra Club takes great pride in respecting the wild places of the earth. One way to do this is to minimize our impact on the places where we lead our outings. Leave No Trace (LNT) is a program with a mission to promote and inspire responsible outdoor recreation through education, research, and partnerships. We encourage all leaders to follow and promote the LNT Principles of Outdoor Ethics on every outing they lead.

The hard copy Outings Leader Handbook includes a small plastic LNT card that you can use as a reminder and teaching aid in the field.

For more information on the LNT program, visit [www.lnt.org](http://www.lnt.org) or call 1-800-332-4100.

### **The LNT Principles of Outdoor Ethics form the framework of LNT's message:**

1. Plan ahead and prepare
2. Travel and camp on durable surfaces
3. Dispose of waste properly
4. Leave what you find
5. Minimize campfire impacts
6. Respect wildlife
7. Be considerate of other visitors

### **Plan ahead and prepare**

Know the regulations and special concerns for the area you'll visit.

Prepare for extreme weather, hazards, and emergencies.

Schedule your trip to avoid times of high use.

Visit in small groups. Split larger parties into groups of 4-6.

Repackage food to minimize waste.

Use a map and compass to eliminate the use of marking paint, rock cairns, or flagging.

## **Travel and camp on durable surfaces**

Durable surfaces include established trails and campsites, rock, gravel, dry grasses, or snow.

Protect riparian areas by camping at least 200 feet from lakes and streams.

Good campsites are found, not made. Altering a site is not necessary.

### **In popular areas:**

Concentrate use on existing trails and campsites.

Walk single file in the middle of the trail, even when wet or muddy.

Keep campsites small. Focus activity in areas where vegetation is absent.

### **In pristine areas:**

Disperse use to prevent the creation of campsites and trails.

Avoid places where impacts are just beginning.

## **Dispose of waste properly**

Pack it in, pack it out. Inspect your campsite and rest areas for trash or spilled foods. Pack out all trash, leftover food, and litter.

Deposit solid human waste in catholes dug 6 to 8 inches deep, at least 200 feet from water, camp, and trails. Cover and disguise the cathole when finished.

Pack out toilet paper and hygiene products.

To wash yourself or your dishes, carry water 200 feet away from streams or lakes and use small amounts of biodegradable soap. Scatter strained dishwater.

## **Leave what you find**

Preserve the past: examine, but do not touch, cultural or historic structures and artifacts.

Leave rocks, plants, and other natural objects as you find them.

Avoid introducing or transporting non-native species.

Do not build structures or furniture; do not dig trenches.

## **Minimize campfire impacts**

Campfires can cause lasting impacts to the backcountry. Use a lightweight stove for cooking, and enjoy a candle lantern for light.

Where fires are permitted, use established fire rings, fire pans, or mound fires.

Keep fires small. Only use sticks from the ground that can be broken by hand.

Burn all wood and coals to ash, put out campfires completely, then scatter cool ashes.

## **Respect wildlife**

Observe wildlife from a distance. Do not follow or approach them.

Never feed animals: it damages their health, alters natural behaviors, and exposes them to predators and other dangers.

Protect wildlife and your food by storing rations and trash securely.

Control pets at all times, or leave them at home.

Avoid wildlife during sensitive times: mating, nesting, raising young, or winter.

## **Be considerate of other visitors**

Respect other visitors and protect the quality of their experience.

Be courteous. Yield to other users on the trail.

Step to the downhill side of the trail when encountering pack stock.

Take breaks, and camp away from trails and other visitors.

Let nature's sounds prevail. Avoid loud voices and noises.

The *LNT Principles of Outdoor Ethics* are copyrighted by National Outdoor Leadership School and Leave No Trace, Inc.

# Watercraft Outing Policy

*Policy for all Sierra Club Outings*

*Adopted by the Outdoor Activities Governance Committee on July 10, 2001*

## Policy

Sierra Club watercraft outings shall be run in accordance with insurance requirements (see the **Risk Management and Insurance Manual** for details). Leaders shall have training and experience -- including rescue skills -- appropriate to the anticipated conditions and hazards. Participants shall be screened and shall sign waivers. Outings shall make use of appropriate safety equipment based on type of outing, environmental conditions, and local legal requirements.

## Guidelines for Implementation of Policy

### 1. Leader Training and Experience

- Confident swimming ability.
- Knowledge of water rescue techniques appropriate to the type of outing. The Outing Leader should be confident conducting rescues in the most difficult portion and/or in the most adverse possible conditions on the specific body of water.
- Qualifications and experience well within the demands of the outing. For whitewater outings, this means having prior experience leading outings on rapids the same class as those being run on the outing. If the watercourse contains Class III rapids or higher, the Outings Leader should have recently navigated the watercourse.

*Sierra Club Entities are recommended to expand upon this list to reflect the type of watercraft outings that they are conducting.*

### Additional Safety Responsibilities

In addition to meeting the above training and experience, Outing Leaders of watercraft outings have the following responsibilities:

- The Outing Leader will be responsible for properly screening all participants well in advance of intermediate and advanced outings to determine if they have the required experience.
- The Outing Leader will be responsible for having all participants sign a Sign-in Sheet and Liability Waiver before the outing begins and is responsible for sending this waiver to their Outings Chair. Outing chairs shall keep these on file for at least as long as the statute of limitation for negligence lawsuits in their state. On restricted watercraft activities, the Sign-in Sheet and Liability Waiver should be sent to the Regional Outings and Lodges Manager/Outings Department, in the National office.\*

- The Outings Leader must follow all state and federal regulations for operating watercraft used for carrying passengers. Sierra Club Entities conducting watercraft activities are responsible for checking with their state on any regulations for leading the type of watercraft activity being approved. (For more information on state boating laws, see [www.nasbla.org](http://www.nasbla.org))

## 2. Participation

- All participants must be wearing securely fastened personal flotation devices (PFDs) at all times, except when inside an enclosed cabin on a watercraft or except when aboard a large vessel with secure hand railings. The weight limits for each size PFD should be observed and not exceeded. The type of PFD should be designated for use with the type of water conditions/activities. Most states require by law that a child below a certain age must wear a PFD at all times. Entities should check with their state for additional PFD requirements.
- On all outings running Class III rapids or higher participants must wear Type III or V USCG approved PFD that is designed for whitewater use.
- All canoeists and kayakers on Class II or higher must wear Type III or V USCG approved PFD that is designed for whitewater use.
- Participants should wear appropriate whitewater helmets when using kayak and canoes on class II rapids or higher, and on rafting outings running Class IV rapids or higher.
- Participants should be dressed for the water and weather conditions. When air and water temperature combined does not total 100 degrees Fahrenheit, wetsuits, drysuits, or technical whitewater clothing should be worn.

## 3. Watercraft Outing Activities

- Watercraft may not be owned by Sierra Club or purchased with Club funds.
- All outings should be scheduled and approved by the Sierra Club Entity responsible for overseeing such activities.
- All participants shall be informed in advance of the outing of the requirement to sign an assumption of risk and liability waiver, either by including this requirement in the advertising of the outing or via a communication from the Outing Leader.
- There will be a Leader/Participant ratio on all activities as follows:\*
  - ◆ On Class I rapids (flatwater) 1:16
  - ◆ On Class II rapids 1:10
  - ◆ On Class III rapids or higher for all types of watercraft 1:8 (also, at least one leader per raft)

\*Assistant leaders will suffice as additional leaders.

- Inners tube activities are not permitted on Class III or higher rapids.
- There shall be at least one throw rope or throwable (Type IV) PFD device on the outing, ideally one per watercraft.
- Water conditions (e.g.: river flows, tides, etc.) and weather conditions shall be assessed during the outing planning and again at the departure point. Any warnings or restrictions from a land agency or the Coast Guard shall be adhered to. When the outing is led by professional guides, the Sierra Club leaders should participate in all discussions of water and weather conditions and make the decision to cancel the outing if he/she deems it necessary.
- There should be at least one First Aid Kit carried on the outing.
- Kayaks and canoes should carry appropriate flotation devices when travelling in Class II or higher rapids.

#### **4. Restricted Watercraft Activities**

Certain watercraft activities require additional approval from the Outings Department in the National office prior to advertising or making commitments for the outing. The specific criteria of what watercraft activities are restricted are based upon insurance requirements and therefore may change over time. For specific criteria on what is considered a restricted watercraft activity, please see the **Risk Management and Insurance Manual**.

If the watercraft activity falls under the restricted outing category, the leader will need to fill out an **Application for a Restricted Watercraft Outing**.



# Trailhead Talk

All Sierra Club Outings should begin with a trailhead talk. While some elements of this list might require more detail on an overnight outing and less on a short day hike, it is important that you cover each element. You can cover some of this information during a pre-outing meeting as well.

## 1. Welcome and Introductions

- Gather the group together.
- Introduce yourself and other outings staff.
- Ask participant to introduce themselves and/or play an ice-breaker name game.

## 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

**Note:** In most cases, the waiver should be signed at the initial meeting point, not the trailhead.

- Present the liability waiver and ensure all participants understand it.
- Have all participants read and sign a liability waiver.
- Ensure you have medical authorization forms for all unaccompanied minors.

## 4. Introduce the Conservation Message

- Introduce the issue you plan to discuss, materials you plan to hand out, etc.

## 5. Route Plan and Trail Conduct

- Describe the route and travel plan.
- Designate a "point" and "sweep" and set rules for group travel
- Explain "pack it in/pack it out" and other **Leave No Trace** highlights that apply to your outing.

## 6. Safety Issues

- Explain what to do if separated from the group (see **Conducting an Outing: Lost Participants** for Sierra Club procedures).
- Describe the inherent risks involved in this activity.
- Describe the environmental risks the group might encounter (i.e., river crossings, snow, etc.).
- Briefly describe your safety management plan
- Make sure all participants are comfortable with the risks.
- Explain why hydration is important.

## 7. First Aid

- Inform participants which leader is in charge of first aid and point out the location of the first aid kit.
- Ask if anyone has medical issues you should know about.
- Describe proper foot and blister care.

## 8. Equipment and Food

- Ensure all participants have proper gear, food, and clothing.

## 9. Are you ready to go?

- Answer any last minute questions.
- Go for it!

On overnight trips, or when necessary, make sure to cover these additional topics during the first day:

## 1. Health and Hygiene

- Ensure participants know that water must be purified and demonstrate the proper techniques.
- Describe proper **Leave No Trace** etiquette for disposal of human wastes.
- Explain the importance of hand washing, particularly before food preparation.

## 2. Campsite Selection and Conduct

- Discuss proper **Leave No Trace** techniques for campsite selection.
- Explain campsite safety issues (use of flashlights, etc.).
- Describe techniques for reducing impact on the campsite.
- Discuss the impacts of campfires and (if applicable) demonstrate **Leave No Trace** techniques for building a fire.

# On the Trail

## Point and Sweep

All outings that involve group travel should have a designated "point" and "sweep." Each job can be given to either an Outings Leader or capable and trustworthy participant.

- **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.

It is a good idea for the point and sweep to have some method of emergency communication, such as whistles. Also, make sure the sweep is carrying a first aid kit to ensure that resources are quickly available in the event of an injury.

## Trail Etiquette and Protocol (for hiking and backpacking)

Make sure participants understand these rules before the outing begins:

- The point is always in front, the sweep is always in the rear.
- Always stop at trail junctions and ensure the group member behind you knows which way to go.
- Keep the trail clear when stopping for breaks.
- When "nature calls," inform another group member or leave your pack near the trail to make sure they aren't left behind.
- Stay on the trail, and never cut switchbacks.

# Emergency Response

All leaders should be prepared to deal with any unforeseen events that could reasonably occur on their outings. Preparation includes proper training, safety management planning (see **Planning an Outing**) and experience in the field. Thorough planning and good judgment will help ensure most unforeseen events do not become emergencies. However, emergencies do occur. These steps will help you deal with them.

## Scene Management

1. **Get calm and stay calm**
  - Calm yourself down *before* entering an emergency scene
  - Your calm will spread to others, including your patient
  
2. **Re-establish (or establish) leadership roles**
  - Every emergency scene should have a **primary leader** and **first aid leader**
  - The **primary leader** keeps away from the action and considers the needs and safety of the entire group (also manages resources and coordinates evacuation plans)
  - The **first aid leader** tends to the medical needs of the injured patient(s) (not necessarily hands-on)
  
- **Survey the scene *before* rushing in**
  - Is the scene safe?
  - What happened?
  - How many injured people are there?
  - Can bystanders help?
  
- **Protect yourself and your group members**
  - Don't create any more injuries

## Patient Care/First Aid

*(Always stay within your level of training!)*

1. **Get consent**
  - Conscious patients have the right to refuse care at any time, so ask permission before acting
  - Inform them of:
    - o Your name
    - o Your level of training
    - o What you think is wrong and what you want to do
  
2. **Use protective barriers**
  - Use latex gloves and breathing devices, or improvise barriers if necessary
  
- **Check the ABCs and address life-threatening problems**

- **Airway:** Is the patient's airway clear?
- **Breathing:** Is the patient breathing?
- **Circulation:** Is there life-threatening bleeding?
- **Do a secondary survey and record patient information**
  - Use the **Patient Report Form** as a guide
  - Document your assessment and treatment of the patient -- this report will communicate the status and history of a patient to medical and rescue personnel not present during the incident
- **Stabilize the patient and the scene BEFORE sending out for help or evacuation**

## Develop an Evacuation Plan

*(The Patient Report Form has an evacuation plan template on the back.)*

1. **How are you going to safely get the patient to help?**
2. **Consider while planning:**
  - Severity and urgency of the medical problem
  - Distance to the roadhead
  - Terrain difficulty
  - Strength and stamina of the group
  - Weather
  - Self-evacuations are extremely difficult if the patient needs to be carried
  - Search and rescue teams are often only available for life or limb emergencies
3. **Write down your evacuation plan**
  - This is necessary for all but the most simple evacuations
  - If your group splits up, make sure each party has identical copies of the evacuation plan
4. **Every evacuation plan should include the following information:**
  - Type of evacuation (walking, helicopter, litter, etc.)
  - Number of patients (include **patient reports** for each)
  - Special requests or needs (medical supplies, rescue team, litter, helicopter, etc.)
  - Routes and timetables for each party
  - Backup plans for each party
  - Return routes and timetables for the messenger team (if applicable)
  - Marked maps showing:
    - Location of the incident
    - Present location of the group

- o Anticipated route for each party
  - o Roadhead destination for each party
6. **Self-evacuations** (patient walking with or without assistance)
    - Never let anyone walk out unaccompanied
    - A leader should accompany the evacuation
    - For longer walks out, an evacuation party of four or more is best
    - If the group is splitting up, make a written **evacuation plan** (see below) and give copies to each group
  7. **Sending a messenger team for evacuation assistance**
    - Team size of four is ideal (if one person gets hurt, team can split into two groups of two)
    - Team should have necessary gear and food to be self-sufficient
    - Team should carry copies of the **evacuation plan** (see below) and **patient report(s)**
    - The patient(s) and group should **stay in one place**, so that a rescue team can find them
  8. **Brief the group and delegate tasks**
    - Select and brief the messenger team going for help
    - Gather and inventory resources (clothes, shelter, food, water, etc.)
    - Build a fire
    - Find and organize a campsite
    - Feed and hydrate the group
    - Prepare the evacuee's pack
    - Scout a route
    - Find and mark a landing site for a helicopter
    - Build a litter

## Who to call

When your group is able to communicate with the outside world, do the following:

- **Frontcountry emergencies** (less than one hour from help):  
Contact the local Emergency Medical System (E.M.S.) (e.g., **911**)
- **Backcountry emergencies** (greater than one hour from help):  
Contact the local search and rescue team (this information should be in your Safety Management Plan), as well as the E.M.S.

### **Life-Threatening Emergencies or Fatalities:**

As soon as possible, contact the Sierra Club Outings Department at:  
**888-Outings** (888-688-4674).

## Lost Participants

On outings that make careful use of the Point and Sweep method (see **Conducting an Outing: On the Trail**) lost persons should be a rare occurrence. If such an incident does occur, all leaders should know the following protocol for finding lost participants. Participants should be aware of this protocol as well.

- **Sierra Club Protocol Concerning 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 rule may appear harsh and could conceivably jeopardize the safety of someone ill or injured. However, the Club's years of outings experience have led to the conclusion that such occurrences are rare and do not justify the possible danger to other outings participants caused by undertaking night searches. In most instances the terrain is unfamiliar--even hazardous--and a probable result of a night rescue would be additional participants lost or injured.

When aware of this policy, the lost individual can settle down for the night and make the best of the predicament. The person should not settle next to running water, which might obliterate the sound of searchers' calls. The person, in fact, may not be lost, but may just have been caught away from camp by darkness. In any event, the lost person should understand that there are usually several hours of daylight before 8:00 A.M. in which to try to rejoin the group before a search will begin.

With lost children, your emotions, as well as the emotions of parents and outings participants, often force action. If conditions necessitate a night search, proceed methodically. A closely spaced line of searchers is superior to random efforts. Amateur rescuers, by covering tracks and frightening a lost child with loud yelling, can make it even more difficult for experts to locate that child the next day.

## At the End of an Outing

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

- Double check the sign-in sheet or trip roster to ensure all participants are accounted for.
- Invite non-members to join the Sierra Club (have membership brochures available).
- Distribute any other Club materials you have, particularly ones related to your conservation message.
- Ask participants if it is okay for you and/or the Sierra Club to contact them in the future.
- Thank them for their participation, and invite them to join a Sierra Club outing again.

## After the Outing

Each Sierra Club Outings program has slightly different procedures for post-outing reports. In every case, the following items must be reported:

### Incident Reports

All illnesses or injuries that require medical attention after the outing need to be reported to the Sierra Club Risk Management Department. You must also report lost participants or incidents in which your trip members help an injured person who is not a member of your party.

### Liability Waivers

- **National Outings:** Mail all signed liability waivers to your trip liaison.
- **GCO and ICO:** Mail all signed liability waivers to:

IT Chair RE: Signed Liability Waivers  
Sierra Club-GLS Ventana  
PO Box 604  
Santa Cruz, CA 95061-0604

Please e-mail the IT chair the e-mail addresses of any participants who indicate they would like the e-newsletter, *GET OUT*.

- **GCO and ICO** restricted outings: Mail all signed liability waivers to:

Sierra Club  
Outings Department  
85 Second St., 2nd Floor  
San Francisco, CA 94105-3441  
Attn: Regional Outings

### Additional Ideas

These additional items are not usually required, but they can help improve your outings program and the Sierra Club as a whole.

- **Communicate with participants**  
If you can, keep in touch with participants after the outing. Let them know about events related to the conservation issues you discussed, or notify them of future outings that you lead. Many outings participants become devoted Sierra Club volunteers, activists, and leaders. Keeping in touch will help make that happen.
- **Prepare an outing write-up or slide show**  
Write an article about the outing for your newsletter or website, or ask a participant to do so. Include photos if possible. These articles help spread the word about Sierra Club Outings and inform other leaders of potential spots to visit or avoid. Slide presentations are also a great way to let people know about natural places to explore, enjoy, and protect.

## STANDARDS OF CONDUCT

Individuals who want to preserve, protect, and enjoy the environment are motivated to work actively with the Sierra Club when they find satisfaction through a sense of accomplishment, and of recognition and belonging. Collegiality and teamwork build such motivation, and are qualities recognized to be of fundamental importance throughout the Sierra Club.

The following standards of conduct have been adopted as consistent with these concepts:

(1) **Work as a team:** Collegial cooperation invites participation and nurtures success; antagonistic rivalry has the opposite effect.

(2) **Delegate:** Learn, and respond to, the interests and capabilities of each "team" member; provide opportunities for accomplishment and satisfaction.

(3) **Be collegial:** Show courtesy and respect; be kind, not caustic. Recognize and acknowledge those who help, and rejoice in their successes. Never belittle, either publicly or privately.

(4) **Communicate openly:** listen and explain patiently and thoughtfully and ask the same of others.

Be as persuasive, clear and concise as you can be; strive to understand and consider the ideas, viewpoints, motivations, and goals of others. Don't expect decisions or actions based on "too little information, presented too late."

(5) **Show trust:** Trust has many facets. It implies mutual openness and accepting shared responsibility. It implies accepting delegated decisions and majority decisions properly arrived at through an accepted decision-making process. It implies honoring confidences.